

The Anholt GFK-Roper's Nation
Brands Index: Summary Report
for Scotland

**THE ANHOLT GFK-ROPER NATION BRANDS
INDEXSM: SUMMARY REPORT FOR SCOTLAND 2009**

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The Anholt-GfK Roper Nation Brands Index: Summary Report for
Scotland 2009

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Table of Contents

1	EXECUTIVE SUMMARY	5
2	INTRODUCTION	6
3	METHODOLOGY	9
	Scotland Performs and National Indicator 45	11
4	OVERALL SCORE	13
	Scotland's Position on the NBI	13
	How Scotland Sees Itself	16
	Summary	16
5	SCOTLAND'S 6 DIMENSIONS OF REPUTATION	17
	Exports	18
	Governance	18
	Culture	19
	People	19
	Tourism	20
	Investment and Immigration	20
	Summary	21
6	CONCLUSION	22
7	BIBLIOGRAPHY	23

1 EXECUTIVE SUMMARY

1.1 As part of the Scottish Government's National Performance Framework, one of its national indicators looks to assess efforts to "improve people's perceptions, attitudes and awareness of Scotland's reputation".¹ The Scottish Government uses the Anholt-GfK Roper Nation Brands IndexSM (NBI)² to assess and monitor how Scotland's reputation is perceived around the world in comparison to 49 other nations.

1.2 Scotland's score (60.0) and rank (14th) shows that it has a unique reputation abroad compared to nations of similar size. Scotland's reputation is stable in comparison to its 2008 performance in terms of its score (60.2 in 2008) and rank (16th in 2008). A statistical assessment of change against the 2008 baseline for the purposes of Scotland Performs shows that Scotland's performance is maintaining.

1.3 Scotland continues to score highly, placed as it is in the top 20 nations and it is scored and ranked ahead of the other smaller, high income liberal democracies on the index: New Zealand, Denmark, Finland and Ireland.³

1.4 Tourism, People and Governance are perceived as the main strengths of Scotland's reputation. Within that, Scotland appears to do best on questions that relate to "softer" aspects of its reputation, e.g. cultural heritage, good quality of life and a friendly welcome.

¹ Scottish Budget Spending Review 2007, the Scottish Government, 2007

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

³ The Scottish Government is unable to publish the scores and ranks relating to the performance of other countries on the NBI that is not already in the public domain because it is owned by GfK Roper and commercially sensitive. The top 10 scores and ranks for the NBI 2009 are publicly available on the GfK Roper website

2 INTRODUCTION

2.1 The Scottish Government's purpose is to create a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.⁴ Its National Performance Framework explains what government in Scotland wants to achieve and recognises the role that a strong, positive reputation can play. In light of the economic recession and changes around the world, the need to forge and adapt to new ways of building Scotland's reputation has increased.⁵ Being an outward facing nation means having a reputation that accurately captures Scotland's *smeddum* in a way that is useful to the social and economic aims of people living here.⁶

2.2 In an increasingly busy world, where countries are able to communicate vast amounts of information about themselves, the issue of reputation management has become more important. Having an awareness of how people think about your country - like its people, its businesses, services and products, its tourism and culture, and its education and employment opportunities – is a vital piece of knowledge to have.

2.3 And that's because people, in the widest sense, are the consumers, the tourists, the economic migrants, international students, and investors making decisions about what to buy, where to work and visit etc. Given that people are likely to only think about countries other than their own for a few seconds each year, if at all, a country's reputation must be both accurate and clear, if it is to be thought of as interesting and worthy of attention.

2.4 Governments and their agencies have an important part to play in managing reputation because of their ability to lead, act and communicate on an international stage. They have a duty to protect and strengthen this asset which belongs to the whole country. Evidence shows that reputation management should not be thought of as a "brand" or "slogan" and that it is not a simple matter of *telling* people that you are something you want them to think you are – Scotland has its own recent experience of this.⁷ Equally, government cannot act alone in building or changing how its country's reputation is seen.

Reputation Management

2.5 A great deal has been written about reputation management and continues to be written⁸ and, for Scotland, it is not the first time that Scotland's international image has been thought about.⁹ More recently, the theory and practice of reputation

⁴ The Government Economic Strategy, the Scottish Government, 2007

⁵ The Scottish Government Economic Recovery Programme, The Scottish Government, 2009

⁶ Smeddum is a Scots word for "spirit" and "determination"

⁷ Scotland's International Image: Message Platforms – Research Findings, Scottish Government, 2007

⁸ See the journal Place Branding and Public Diplomacy, Palgrave MacMillan

⁹ For example Scotland the Brand: the making of Scottish Heritage, McCrone D, Morris A and Kiely R, Edinburgh University Press, 1995

management has been called Competitive Identity¹⁰ and the theory's leading proponent, Simon Anholt, argues that by coordinating efforts across the key drivers of reputation – such as tourism and exports – a nation can more effectively:

- attract people to live, work, learn, do business, visit and buy its products;
- add value to actions, people and objects (e.g. people seeing an individual as friendly by virtue of being from a particular place);
- achieve a clear and spontaneous sense of purpose about “what a country is for/about” across all organisations, groups and individuals responsible for communicating and managing reputation at home and abroad.

2.6 As part of the Scottish Government's National Performance Framework, one of its national indicators looks to assess efforts to “improve people's perceptions, attitudes and awareness of Scotland's reputation”.¹¹ And there is a lot of information and data already available from different parts of government about how their own specific activities relate to this objective: policy engagement with other European countries, USA, Canada and China, as well as the efforts of its agencies and partners at VisitScotland, Scottish Development International and others who have a part in communicating Scotland overseas.

2.7 However, in order to make an assessment of the National Indicator, it is vital that any analysis looks at Scotland's reputation as a *whole*. An evaluation of government only activity or in relation to one part of Scotland's image, e.g. as a tourist destination, would not provide a complete picture. To therefore see how strong Scotland's overall reputation is in global terms, compared to other countries, a survey was undertaken using the Anholt GfK-Roper Nation Brand Index. The data allows for a better understanding of Scotland's reputation as it exists in the minds of 20,000 people in 20 countries¹² around the world in 2008 and 2009; and as it compares to the 49 countries on the Nation Brand Index.

2.8 To use and understand the data from the survey properly, it is important that it is seen as a *snapshot* of people's *attitudes* about Scotland, not behaviours – attitudes and behaviours are different things. Also, this is not an indicator of government performance, because it is a short survey about Scotland in its very broadest sense and many of the people taking part in the survey will be working from a limited and/or out-of-date awareness of Scotland. Equally, it should not be looked on as an evaluation of any delivery agency/arm of government: these bodies are responsible for setting performance indicators and monitoring progress towards their delivery.

2.9 As will be explained in Chapter 3, the data is an *indicator* which, over a number of years, can monitor and track perceptions of Scotland's reputation, but only in the long-term. The data should be seen in context and understood amongst other socio-economic information and data about how the Scottish Government is

¹⁰ Competitive Identity, Anholt A, Palgrave MacMillan, 2007

¹¹ Scottish Budget Spending Review 2007, the Scottish Government, 2007

¹² Twenty countries are selected for the survey for the NBI study; the survey strives to represent regional balance as well as balance between high-income and middle-income countries.

doing in its efforts to alleviate the impacts of the economic recession and prepare Scotland for sustainable economic growth in the future.

2.10 The NBISM is about perceptions, not reality and therefore tells us what people *think*. Attitudinal data of this kind is a very useful way of helping to understand more about how others see us and how we see ourselves.

Background to the Anholt GfK-Roper Nation Brand Index

2.11 The Anholt GfK-Roper Nation Brand IndexSM (NBI)¹³ is an analytical tool which attempts to measure and rank a country's reputation as a whole, i.e. not by just focusing on one particular dimension (e.g. 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.

2.12 However, it is not 'definitive' because concepts such as reputation and national identity and their measurement are hugely complex. It is a useful starting point though, from which to enter into and think about how people's perceptions relate to social and economic realities; the relationship between place and image; and the psychology and sociology of identity and culture; and much more.

2.13 The survey in August 2008, in which Scotland's reputation was scored and ranked, was published by the Scottish Government on the Scotland Performs website.¹⁴ This report looks at the data available from the survey in 2009, making comparisons where possible. As Chapter 3 explains, the statistical assessment about changes against Scotland's 2008 baseline score shows that, with data for 2 years, Scotland's reputation is stable. This will be reviewed annually by the Scotland Performs Technical Advisory Group.

¹³ The Anholt-GfK Roper Nation Brands Index and Nation Brands Hexagon are trademarks and copyrights of Simon Anholt and GfK Roper

¹⁴ <http://www.scotland.gov.uk/About/scotPerforms/indicators/reputation>

3 METHODOLOGY¹⁵

3.1 Conducted annually with GfK Roper beginning in 2008, the Anholt-GfK Roper Nation Brands Index examines the image of 50 nations. Each year, approximately 20,000 adults aged 18 and up are interviewed in 20 core panel countries. The Anholt-GfK Roper Nation Brands Index looks at a country's image by examining six dimensions of national competence all of which are treated equally with no weighting. This gives an overall sense of a country's reputation as a whole. The six dimensions are:

3.2 Exports. Examines respondent's image of products and services from each country and the extent to which consumers proactively seek or avoid products from each country-of-origin.

3.3 Governance. Considers public opinion regarding the level of national government competency and fairness and describes individuals' beliefs about each country's government, as well as its perceived commitment to global issues such as democracy, justice, poverty and the environment.

3.4 Culture. Reveals global perceptions of each nation's heritage and appreciation for its contemporary culture, including film, music, art, sport and literature.

3.5 People. Explores the population's reputation for competence, education, openness and friendliness and other qualities, as well as perceived levels of potential hostility and discrimination.

3.6 Tourism. Captures the level of interest in visiting a country and the draw of natural and man-made tourist attractions.

3.7 Immigration and Investment. Looks to attract people to live, work or study in each country and reveals how people perceive a country's economic and social situation.

3.8 The NBISM score is an average of the scores from the six dimensions mentioned above. There are between 3 and 5 ratings questions for each of the 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 hexagon point also has a word choice question which gives some depth to how those surveyed perceive a nation's image.

3.9 The 2009 NBISM survey is conducted in 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural, and tourism activities. Given the increasing global role played by developing countries, the survey strives to represent regional balance as well as the balance between high-income and middle-income countries. The core 20 panel countries are:

¹⁵ Because the NBI survey is designed and run by external contractors, GfK Roper, much of the text for this section is provided by the contractors. Additional information has been added by Government analysts to explain the Scottish Government's interests.

- Western Europe/North America: U.S., Canada, UK, 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 In all, 20,939 interviews have been conducted with approximately 1,050 interviews per country for the 2009 NBISM Survey during early-mid July 2009. Adults aged 18 or over who are online are interviewed in each country.¹⁶ 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 2009 online population in that country. Additionally, in the United States, South Africa, India and Brazil, race/ethnicity has been used for sample balancing. The report reflects the views and opinions of online populations in these 20 countries.

3.11 The NBISM measures the image of 50 nations. In each panel country except Egypt, the list of 50 nations is randomly assigned to respondents, each of whom rates 25 nations, resulting in each nation getting approximately 500 ratings per panel country. In Egypt, where respondents are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation getting approximately 250 ratings. The weighting for survey respondents from each country and their thoughts on each of the 6 dimensions are treated equally.

3.12 When deciding which nations should be on the index, GfK Roper explain that the list of 50 nations is based on the political and economic importance of the nations in global geopolitics and the flow of trade, businesses, people, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems are taken into consideration to make the study truly global. NBISM subscription members' interests, like Scotland's, are also reflected in the selection of the countries.

3.13 The list of 50¹⁷ nations is as follows, listed by region:

- North America: U.S., Canada
- Western Europe: UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Norway**, Iceland**, Holland/The Netherlands, Belgium, Switzerland, Finland, Austria

¹⁶ For Scotland approximately half of the sample will have been asked to rate and compare Scotland's reputation.

¹⁷ Chinese respondents are asked of all nations except their own. Holland is asked about in 2009 and The Netherlands in 2008. Holland was not asked in Germany in 2009 due to a translation error.

* Nations new to the NBI 2009

** Nations included in 2008 but not included in 2009

- Central/Eastern Europe: Russia, Poland, Czech Republic, Estonia, Lithuania, Hungary, Turkey, Romania
- Asia Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Malaysia, Singapore, Taiwan, Australia, New Zealand
- Latin America: Argentina, Brazil, Mexico, Chile, Ecuador, Peru, Cuba, Colombia*
- Middle East/Africa: United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Angola*, Kenya*, Nigeria**

3.14 The NBISM did run between 2005 and 2007 on a quarterly basis and this was managed through another contractor. Since going to GfK Roper in 2008 and changing to an annual format, the index now has expanded coverage – regarding nations measured, and in the number of questions asked – and uses a more stringent sample distribution control. This means that there can be no trend comparisons made to pre-2008 data. Conscious efforts were made to keep the 2009 NBISM methodology comparable to the 2008 NBISM, including core questionnaire content, sample design, sampling techniques, and fieldwork procedures.¹⁸

Scotland Performs and National Indicator 45

3.15 The NBISM is used to assess progress against National Indicator 45, “improve people’s perceptions, attitudes and awareness of Scotland’s reputation”, which is part of Scotland Performs.¹⁹

3.16 According to the technical note for National Indicator 45, assessment of any change in Scotland’s performance is based on Scotland’s absolute score as it compares to its 2008 baselines and taking into account year-on-year fluctuations. The view of Scottish Government statisticians is that, based on data for 2 years, Scotland’s performance has not changed and its performance on Scotland Performs is therefore “maintaining”.

3.17 Occasional dramatic shifts in how reputations are perceived from year-to-year are captured by the NBISM. However, across the index, as Figure 1 shows, the score and rank profile is largely the same from 2008 to 2009.

Interpreting the 2009 NBI Data

3.18 Like the vast majority of nations in the Top 20 of the NBISM, Scotland’s reputation does not appear to have undergone any obvious change between 2008 and 2009.

3.19 The NBISM, in the long-term, will represent a useful tool to track and monitor Scotland’s reputation at a high-level. However, the NBISM is not an evaluative-tool of government, or any of its agencies or any policy intervention. Therefore, explicitly targeting a change in Scotland’s position on the NBISM or claiming that the Scottish

¹⁸ Scotland did go on the NBI in Quarter 4 of 2007 before the survey changed. Scotland’s score and rank was used on Scotland’s Performs as a proxy measure for National Indicator 45 until the 2008 baseline was available.

¹⁹ <http://www.scotland.gov.uk/About/scotPerforms>

Government is having a direct impact, positive or negative, would not be a proper use of the NBISM information.

3.20 Government does have a key role to play in the management of a country's reputation, but there are many factors and actors involved. The Scottish Government takes its part very seriously and has actively looked to co-ordinate and work with partners to develop and implement ways of strengthening and maintaining Scotland's reputation, e.g. the Scottish Government's International Framework and its ambitions for Scotland as set out in Your Scotland, Your Choice: A National Conversation.

3.21 Those activities and their impacts are being evaluated and assessed in their own right. The NBISM is not designed to specifically explore or test people's awareness or understanding of any government policy, e.g. Homecoming. The NBISM can play a key role in informing, developing and targeting policy design, but ultimately, it is a test of how Scotland's reputation as a whole exists in the minds of people around the world.

3.22 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 Brand Index because GfK Roper have strong commercial interests in the use of the data. The data published and analysed in this report represents the core information on Scotland's position on the NBISM and has been checked by the contractors to ensure it complies with the Scottish Government's contractual obligations.

4 OVERALL SCORE

Scotland's Position on the NBISM

4.1 Scotland's score of 60.0²⁰ and rank places it in the top 14 nations and shows that Scotland has a high level of recognition as a smaller nation. Its reputation scores and ranks similarly to the other smaller, high income liberal democracies, like Denmark, Finland, Ireland and New Zealand.²¹ This shows that people can accurately identify Scotland in these terms, despite not currently having the same constitutional status as these other nations.²²

4.2 Table 1.1 clearly shows, the UK sample is generally the most positive and favourable towards Scotland of all panel countries, which highlights the strong and positive nature of the links between them²³.

Table 1.1: Scotland's NBISM Rankings by 20 Panel Countries

Panel countries	Scotland's rank	Panel Countries	Scotland's rank
United Kingdom	5	Japan	17
Australia	11	China	18
Canada	11	India	18
Sweden	11	Mexico	18
South Africa	14	Poland	18
United States	14	Turkey	18
Germany	15	Russia	19
Italy	15	South Korea	19
Brazil	16	Argentina	20
France	17	Egypt	32

NBISM rankings range from 1-50

4.3 As found in 2008, Table 1.1 shows that nearly all of the panel countries rank Scotland somewhere in 10th to 20th place among the 50 countries, with the notable exceptions of the UK (5th) and Egypt (32nd).²⁴ Scotland's reputation remains strongest in the UK and among its Western European neighbours, as well as in the United States and Canada, two North American countries which have strong historic and genealogical ties back to Scotland. Except for Australia, Scotland's reputation

²⁰ NBISM scores range from 1-100.

²¹ It should be noted that Scotland's rank position has increased 2 places from 2008. This is because Norway, which finished higher than Scotland in 2008, is not on the index this year and Denmark, which also finished higher than Scotland in 2008, did not score so highly in 2009.

²² Scotland is the only nation on the index that is part of a larger state, i.e. the United Kingdom. At no point in the survey is this information given, although some individuals responding to the survey will be aware of the fact that Scotland is part of the UK. There are no specific survey questions that allow the relationship between the UK and Scotland's reputations to be directly explored.

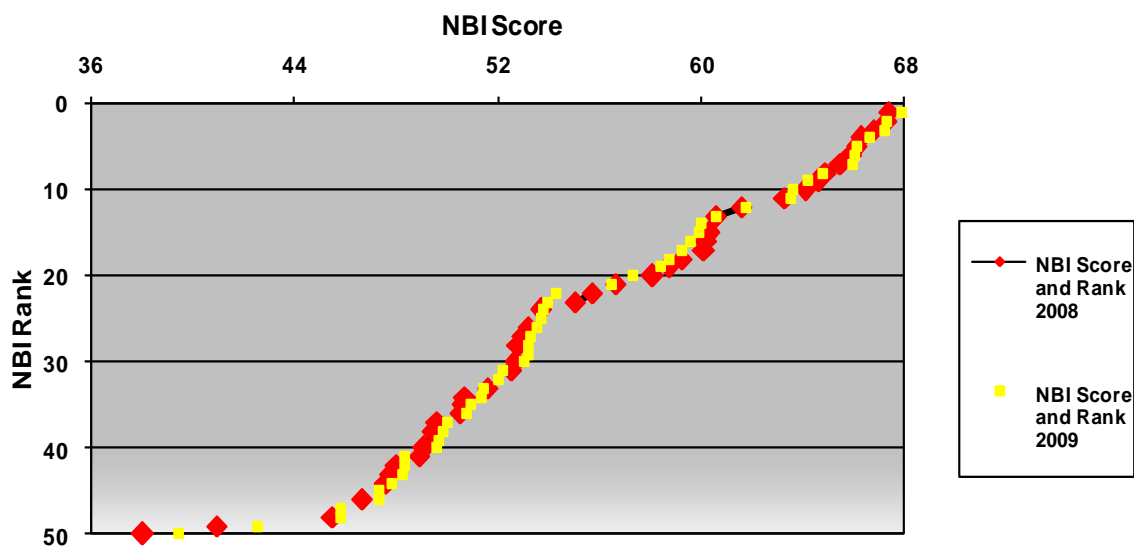
²³ It is likely that some of the UK sample being asked about Scotland are either living in Scotland and/or are from Scotland. However, we cannot tell how many fall into these categories from the data available.

²⁴ Although Scotland is ranked 32nd by Egypt, this should not be mistaken as a "negative" view of Scotland's reputation. An analysis of the Egypt sample's scores across each dimension and its levels of favourability and familiarity with Scotland suggest that, rather than holding a negative view of Scotland's reputation, it is more a case of not knowing enough about Scotland, i.e. don't know/neutral.

begins to fade as you go south from there into Mexico and into Latin America, or move east into Eastern Europe and Asia. It is also true for other countries that cultural links and geography seem to matter when it comes to reputation.

4.4 Looking at score and rank together is important because that way it is possible to see the different messages about Scotland's reputation. As Figure 1 below shows, Scotland's reputation is stable in comparison to its 2008 performance in terms of its score (60.2 in 2008) and rank (16th in 2008). Although Scotland ranks 14th, its score is much closer to the top of the index than it is to the bottom and it leads the group of smaller, high income countries that sit just outside the top 10 nations.

Figure 1: Nation Brands Index - Rank and Score 2008 and 2009



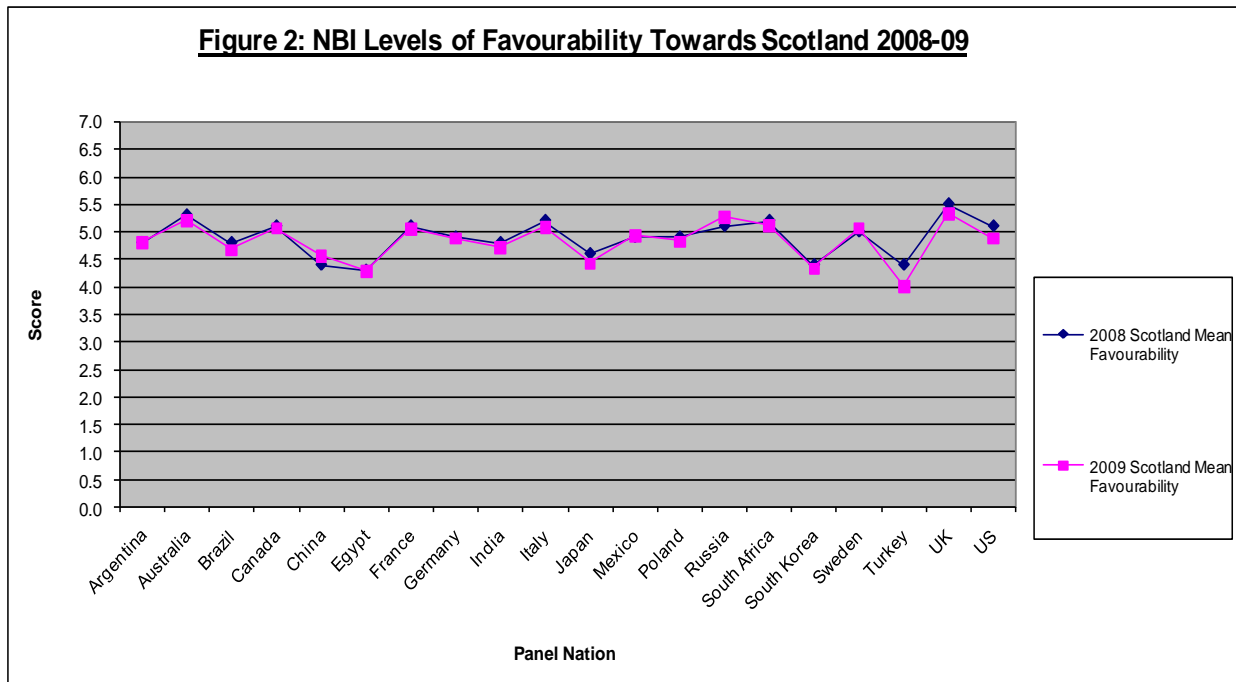
4.5 Before looking at each of the dimensions in turn, there are two other perspectives to take into account about Scotland's overall reputation as perceived through the NBISM: favourability and familiarity. At the beginning of the NBISM survey, before respondents get asked about the different dimensions, they are asked to self-rate how well they know each nation and how favourable they are towards each nation they are being asked about.

4.6 While it should be kept in mind that each of these questions are basic and rely on the respondents' own understanding of what it means to "know" and feel favourable towards a nation (on a scale of 1-7), both questions offer another interesting insight into how people instinctively perceive a country's reputation.

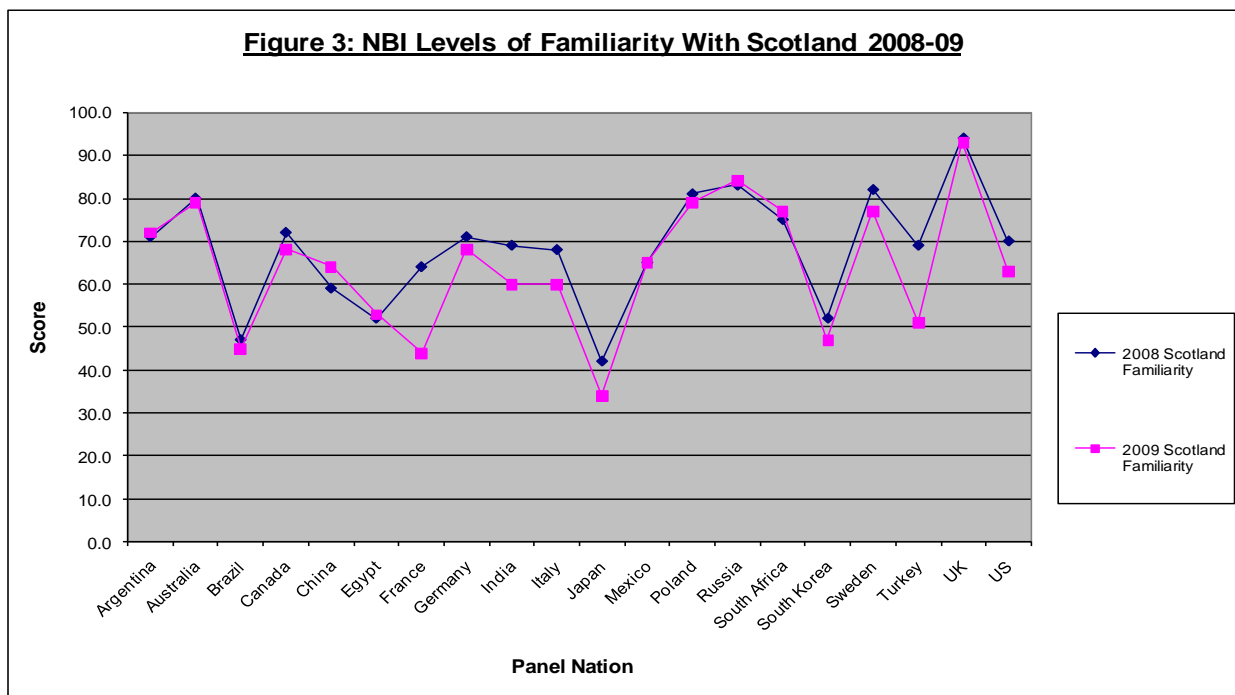
4.7 On favourability, as Figure 2 shows, levels of favourability have stayed largely stable between 2008 and 2009 – Scotland continues to be viewed favourably.²⁵ ten of the twenty panel countries in 2009 were more favourable than their national average for favourability; another eight were in line with their national average; and

²⁵ When comparing the levels of familiarity and favourability between years it is important to note that the NBI does not sample the same people every year. The sample strategy for the survey means that the survey asks questions of people who share similar characteristics, gender split etc, as the previous year.

only two countries, South Korea and Egypt, had levels of favourability below their national average. Within that, it should be noted that the vast majority of scores are positive and no nations were unfavourable towards Scotland, scoring below 3.5.



4.8 Familiarity is of key importance. Other research indicates that how familiar an individual is with a place can positively affect their perceptions.²⁶ As Figure 3 illustrates, the NBISM sample in 2009 do not appear to be as familiar with Scotland as they were in 2008; this can most notably be seen in nations such as the US, France and Turkey.



²⁶ TNS System 3, USA Strategy Research Report, The Scottish Government, 2007

4.9 Because the NBISM does not sample the same individuals year on year, it is not possible to say that particular nations have become less familiar with Scotland. For example, in the case of the USA, the sample is not as familiar with Scotland as the 2008 USA sample. How familiarity levels link to respondents' wider views on reputation is of great interest to researchers working with this data.²⁷

How Scotland Sees Itself

4.10 The NBISM also asks the Scottish sample to rate Scotland's reputation. This is done in each of the panel countries, except China. Scotland's sample scores and ranks Scotland's reputation as number 1, which is reassuring. It should be noted that each of the panel countries that rank in the Top 20 on the NBISM rate their own nation as number 1 – so the fact that Scotland falls into this category is, again, reassuring.

Summary

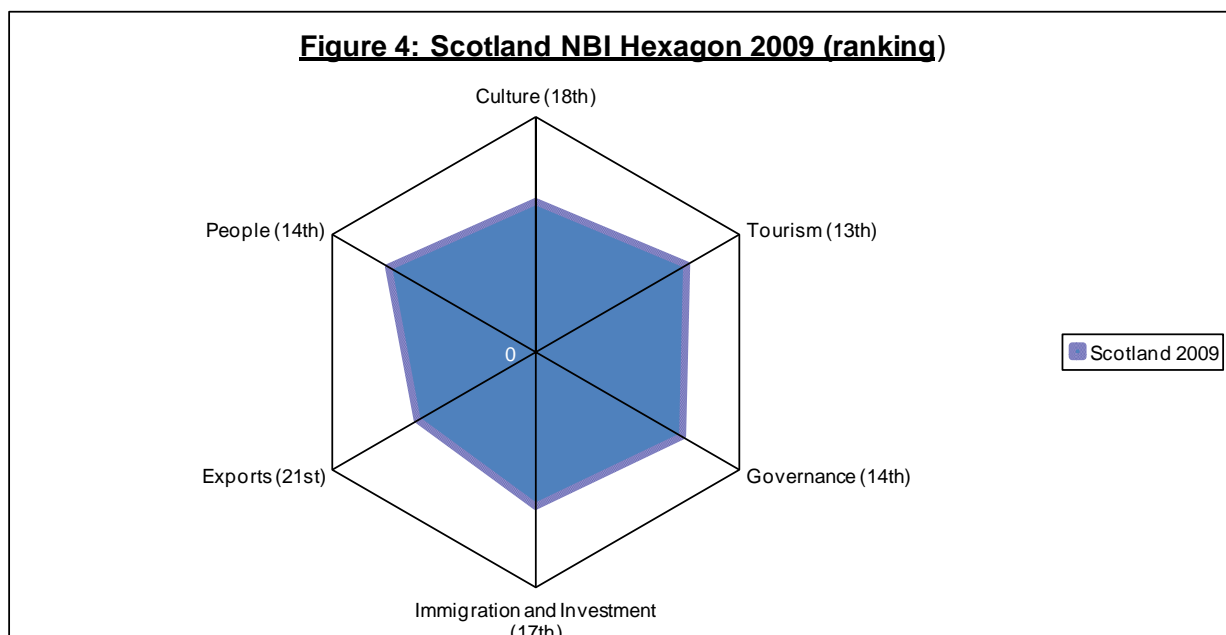
4.11 This chapter has shown the importance of seeing Scotland's performance on the NBISM in context: score, rank, comparisons with other smaller nations, checking for significant year-on-year changes, favourability and familiarity all allow the reader to build a sense of how Scotland's reputation is instinctively understood by people around the world. Building this picture means thinking about each of these factors and not just reaching for the one that suits best.

4.12 Overall, between 2008 and 2009 Scotland's reputation remained stable, with its position on the NBISM continuing to communicate a strong and positive reputation as a smaller, high income liberal democracy. For the purposes of Scotland Performs and deciding whether there has been a real change from Scotland's 2008 baseline score, Scotland's performance symbol has changed from "data still being collected" to "maintaining"; this will be reviewed on an annual basis.

²⁷ Regression analysis carried out by Scottish Government Analytical Services to look at the statistical relationship between familiarity and favourability shows that levels of favourability can be explained by familiarity and vice versa.

5 SCOTLAND'S 6 DIMENSIONS OF REPUTATION

5.1 The 2009 Nation Brand Hexagon© 2000 Simon Anholt diagram in Figure 4 below shows that Scotland continues to have a strong and fairly balanced image, rating as a top twenty country on five of the six dimensions – this is the same as in 2008. Tourism remains the dimension which respondents are most comfortable with when asked to think about Scotland's reputation – they know Scotland's reputation in these terms. Exports is still an area of reputation where those surveyed do not instinctively recognise Scotland's reputation.²⁸



The Nation Brand Hexagon
© 2000 Simon Anholt

5.2 Of the 20 panel countries, most nations appear to make similar distinctions between Scotland's reputational dimensions, e.g. reaching for Tourism as a strong feature. This does vary: for instance countries in Latin American and Asia are less able to distinguish between different aspects of Scotland's reputation, or take a view about what parts they feel most positive towards.

5.3 In Scotland's case, the top tier of nations that appear to know it best and are most favourable about Scotland are Canada, Australia, Sweden and the UK; its second tier are made up of nations like the USA, South Africa and India.

5.4 As this chapter will show, the topline scores and ranks for each dimension do not tell the whole story about Scotland's reputation.

5.5 This means that when it comes to saying that Scotland's key reputational "strengths" are around Tourism, People and Governance, there are other features

²⁸ Although Exports is Scotland's lowest ranking dimension, an analysis of the scores for these questions show that respondents don't know or are neutral to Scotland when asked about its reputation in these terms. It is not the case that people know Scotland for Exports and think it has a poor reputation – it is rather they don't know Scotland for having a reputation in these terms.

that should be taken into account as well, e.g. the cultural heritage element. Overall, there seems to be a thread running through Scotland's narrative about tourism related ideas, e.g. welcoming people (people), rich heritage (culture) and beautiful scenery (tourism).

Exports

5.6 The Exports dimension looks to give a sense of a country's economic strength and potential. The survey asks 3 questions touching on issues to do with science and technology; products and services; and being a leader in creativity and innovation. Respondents are therefore asked to think about a nation's reputation for Exports and how it compares to other countries, to see how well each nation is perceived in these terms.

5.7 Scotland's reputation for Exports has not changed between 2008 and 2009 - although its rank shifted from 22nd to 21st, the picture looks the same. Exports remain Scotland's lowest ranking dimension on the NBISM. Within that, compared to the other smaller, high income, liberal democracies on the NBISM – New Zealand, Ireland, Denmark and Finland – Scotland was grouped more with New Zealand and Ireland than the Scandinavian pairing, which have higher levels of recognition when it came to Exports. And the UK, Sweden, Australia, USA and Canada were the most likely to recognise Scotland's reputation for Exports.

5.8 Looking at each of the 3 elements scored within Exports, Scotland's reputation for products and services was its strongest ranking question in this dimension (17th). However, Scotland's scores in these areas tended to fall in "don't know/neutral" categories, suggesting that people did not recognise Scotland for Exports when thinking about its reputation. It would therefore be inaccurate to say that respondents think Scotland has a negative/poor reputation for Exports.

5.9 The NBISM survey also asks a word association question for each of the dimensions. In the case of Exports, respondents most commonly selected "agriculture" (24%), "food" (16%), "crafts" (15%) and "banking" (12%).²⁹

Governance

5.10 The Governance dimension looks to give a sense of how a nation is governed domestically and its contribution to global policy issues, e.g. world poverty. On the domestic side this is about whether people think you have a fair and open style of government where people are respected and able to live their lives freely. The international aspect is about how a nation is perceived to behave on an international stage on issues like peace, protecting the environment and reducing world poverty.

5.11 Scotland's reputation for Governance has not changed between 2008 and 2009, its ranking is still 14th on the NBISM. Its second strongest reputational feature overall, Scotland is positioned firmly amongst other Western democracies and several places above the USA. However, 3 of its smaller nation comparators – Finland, Denmark and New Zealand – rank above Scotland.

²⁹ Respondents were able to select as many words from a list of 10 Exports related "words".

5.12 Looking at how each of the panel nations ranks Scotland on Governance, it is clear that the liberal democracies recognise one of their own. Six nations place Scotland in their top 10 for Governance – UK, Australia, USA, Sweden, Canada and South Africa.

5.13 Examining the different elements within Governance, Scotland's two highest ranking questions are around its fair treatment of its people (13th) and its contribution to global efforts towards the environment (14th). Its lowest ranking element relates to its contribution to reduce world poverty (18th). Again, this is more a case of those surveying not knowing Scotland for certain issues, rather than thinking of it in negative terms.

5.14 On the word association question for Governance from which respondents could select as many as they wanted from a list of 8 words, the most commonly selected terms were: "trustworthy" (21%), "reliable" (21%) and "reassuring" (11%).

Culture

5.15 The Culture dimension tests three ideas of a nation's cultural reputation: its cultural history and heritage; its contemporary culture, e.g. popular culture and new creative ideas; and its sporting prowess.

5.16 Scotland's reputation for Culture has dropped 2 places from 2008, from 16th to 18th. However, as with 2008, countries like UK, Canada, Australia, France, Italy and the USA are still the most likely to have a stronger awareness of Scotland's culture.³⁰ Alongside its smaller nation comparators, Scotland does very well in the Culture dimension and is the only one to feature in the top 20.

5.17 The different elements of the Culture dimension show an interesting picture. While Scotland receives one of its highest scores for cultural heritage, it does not perform as well as other nations on the index for sporting excellence. Most of the nations that perform well for sporting excellence on the index regularly appear in international football tournaments and compete as an Olympic games team.

5.18 The most commonly selected words for Culture that respondents selected from a list of 10 were: "museums" (29%), "music" (23%) and "sports" (18%).

People

5.19 The People dimension explores three different ideas of reputation to see how respondents see people from other nations: how welcoming they are; how friendly they are; and how employable they are. These elements are supposed to see whether particular nations have reputations for fun, interesting people as well as skilled, hard working people.

5.20 Scotland's reputation for People in 2009 is largely the same as it was in 2008, although it has moved up 1 place from 15th to 14th. Of its smaller nation comparators, Scotland performs well.

³⁰ The UK ranked Scotland as number 5 in 2008 and number 10 in 2009 for Culture; so, although it was still the highest rank for Scotland's Culture from any panel country, it was a change from the 2008 UK panel.

5.21 There does appear to be a difference between each element of Scotland's reputation for People. The softer element around welcoming and friendly people is ranked in the top 10 (10th), while the harder element around employability is ranked lower (16th). In saying that, all the questions within the People dimension for Scotland were scored in the positive range, showing this dimension as a strength for Scotland's reputation overall.

5.22 Respondents were able to select as many words as they wanted from a list of 10 to describe people from Scotland. The most commonly selected words were "hard-working" (25%), "honest" (22%) and "skilful" (20%).

Tourism

5.23 The Tourism dimension is one of the most commonly thought about when people are asked to reflect on another nation's reputation. This dimension therefore looks to test the kind of image a country has as a tourist destination. The survey asks respondents about: their willingness to visit (money etc being no object); natural beauty; historic landmarks; and city/urban attractions.

5.24 From 2008 to 2009, Tourism remains Scotland's reputation peak across the 6 dimensions – its rank going from 12th to 13th. As with all aspects of reputation, Scotland relies on nations it has cultural and geographic links with: 8 of the panel countries rank Scotland in their top 10 for Tourism, including Germany, Italy and France. Scotland's reputation for Tourism is far more prominent than its smaller nation comparators.

5.25 Despite the overall strength, respondents do distinguish between different aspects of Scotland's reputation for Tourism. While its natural beauty is its highest ranking score on the index (7th), Scotland's reputation for vibrant city attractions was much lower (20th). Its scores across each of the questions on the Tourism dimension do fall into the positive category, however.

5.26 There were 10 words that respondents could select from to describe what Scotland has to offer as a tourist destination. "Fascinating" (29%), "educational" (23%) and "exciting" (23%) were the most commonly selected.

Investment and Immigration

5.27 Immigration and Investment looks to see what respondents think of other nations as places to live, work, study, and invest in. The specific questions look to see whether people think Scotland would be a good place to go to for these reasons.

5.28 Scotland's reputation for Investment and Immigration has held steady from 2008 to 2009 - its rank remains as 17th. Three nations rank Scotland in their top 10 for this dimension: UK, Australia and Sweden. The other panel countries that recognise Scotland's reputation highly are Canada (11th), South Africa (12th), USA (12th) and India (13th). Scotland's reputation for this dimension is not as well recognised as it is for Denmark, New Zealand and Finland.

5.29 Again, respondents differentiate between each of the elements that make up the Immigration and Investment dimension for Scotland. Its reputation performs best

as a place to live and work (13th), while the idea of investing in business in Scotland does not register as strongly (20th).³¹

5.30 From 8 words that respondents could select as many as they wished to describe Scotland's economic and business environment, the most commonly selected were "modern" (20%), "forward-thinking" (13%) and "developing" (12%).

Summary

5.31 When each of the 6 dimensions of Scotland's reputation are considered using the Nation Brand © 2000 Simon Anholt, it appears as if Tourism, People and Governance are the parts most recognised by respondents from around the world.

5.32 For the most part, respondents from across the world are able to distinguish between the different parts of what they perceive as Scotland's reputation. Respondents 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 and Commonwealth nations are the most favourable.

5.33 However, the Nation Brand Hexagon© 2000 Simon Anholt only tells part of the story and it is important to recognise the variance within each dimension. For instance, the Culture dimension contains one of Scotland's highest and lowest performing scores on the index around cultural heritage and sport. Again, this illustrates the way respondents feel comfortable enough with the idea of Scotland in their minds, to pick and choose between different ideas and concepts about its reputation.

³¹ None of Scotland's questions for Immigration and Investment were scored negatively. For instance, Scotland's reputation for investing in business was scored as a "neutral/don't know", rather than a poor reputation.

6 CONCLUSION

6.1 Scotland's score and rank shows that it has a strong reputation abroad for a nation of its size. Scotland's score and rank places it ahead of other smaller, high income nations on the index: New Zealand, Denmark, Finland and Ireland.

6.2 As the data source for a National Indicator on Scotland Performs, the NBISM provides a useful insight into how Scotland's reputation is perceived. With data for 2008 and 2009, the statistical assessment shows that Scotland's reputation is stable.

6.3 Tourism, People and Governance appear to be the strongest perceptions of Scotland's reputation. However, this only tells part of the story and Scotland scores very highly for certain aspects of Culture, e.g. cultural heritage, which is connected to the perceptions of Scotland as a tourist destination.

6.4 Exports is the only dimension of reputation where Scotland ranks outside the top 20, although its position remained stable, moving from 22nd to 21st. This is not to say that Scotland has a poor or negative reputation in this area; an analysis of the scores for Exports questions on the survey show that they tend to fall in the "neutral/don't know" category. In other words, it is more a case that respondents do not recognise Scotland's reputation in terms of Exports.

6.5 The NBISM should not be used to evaluate the performance of government policy because it is not designed to do this. There are no questions in the survey that ask respondents about particular government or government agency activities, or whether respondents are aware of such policies and/or initiatives. Government policy and agencies, like Scottish Development International, are responsible for reporting on their performance and delivery.

6.6 Compared to the 2008 NBISM data for Scotland, the nation's reputation is stable. The statistical assessment of change against Scotland's baseline score for the purposes of Scotland Performs shows that Scotland's performance is maintaining.

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