

# **The Anholt-Ipsos Nation Brands Index<sup>SM</sup>: 2020 Report for Scotland**

**Scottish Government Constitution and  
External Affairs Analysis**

**February 2021**

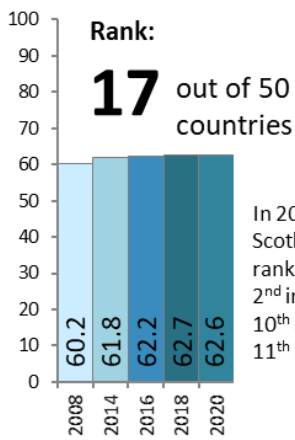


**Scottish Government**  
Riaghaltas na h-Alba  
gov.scot

## Contents

<b>Executive summary</b> .....	<b>4</b>
<b>Introduction</b> .....	<b>7</b>
<b>Scotland's reputation overall</b> .....	<b>10</b>
Scotland's position on the NBI <sup>SM</sup> .....	10
Scotland's reputation in the 20 core panel countries .....	12
Familiarity with Scotland .....	14
Variations between panel countries .....	14
Favourability towards Scotland .....	17
Variations between panel countries .....	17
<b>Scotland's six dimensions of reputation</b> .....	<b>20</b>
Exports .....	24
Exports attributes .....	24
Exports word association .....	25
Governance .....	26
Governance attributes .....	26
Governance word association .....	27
Culture .....	28
Culture attributes .....	28
Culture word association .....	29
People .....	30
People attributes .....	30
People word association .....	31
Tourism .....	32
Tourism attributes .....	32
Tourism word association .....	33
Immigration and Investment .....	34
Immigration and Investment attributes .....	34
Immigration and Investment word association .....	35
<b>How Scotland sees itself</b> .....	<b>36</b>
<b>Conclusion</b> .....	<b>42</b>
<b>Annex A: NBI<sup>SM</sup> Scotland's dimensions and attributes by demographic group</b> .....	<b>44</b>
<b>Further information</b> .....	<b>52</b>

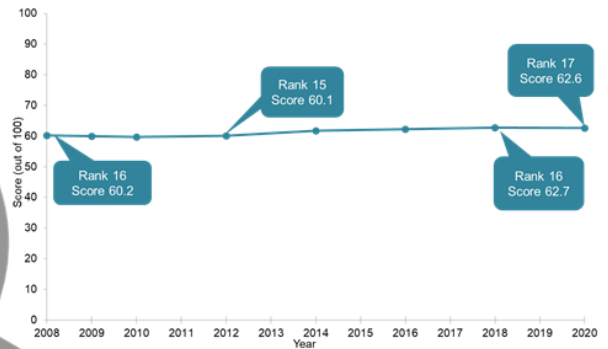
# Scotland's Reputation 2020



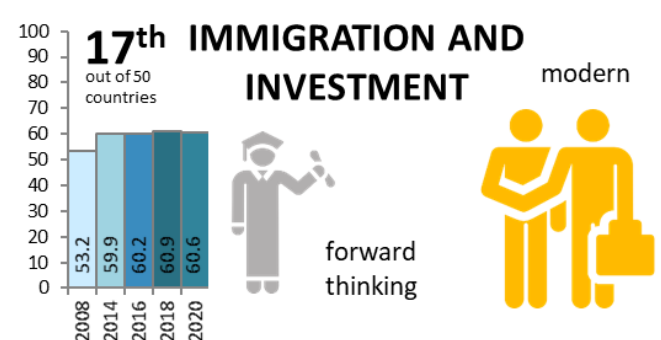
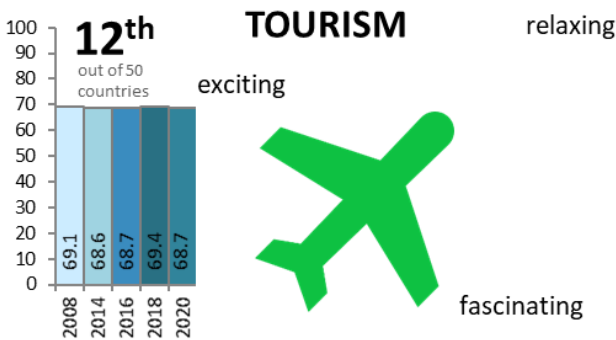
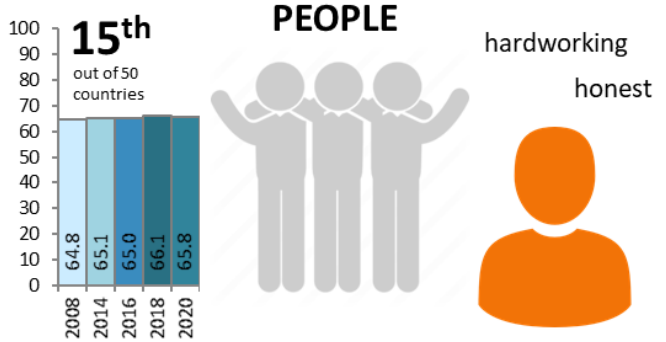
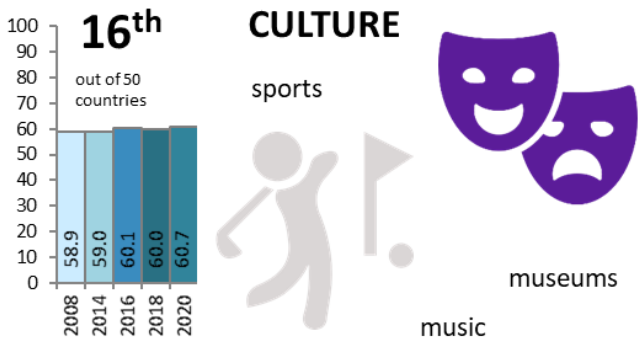
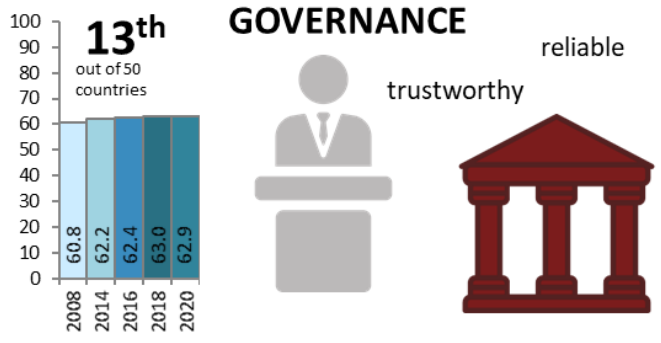
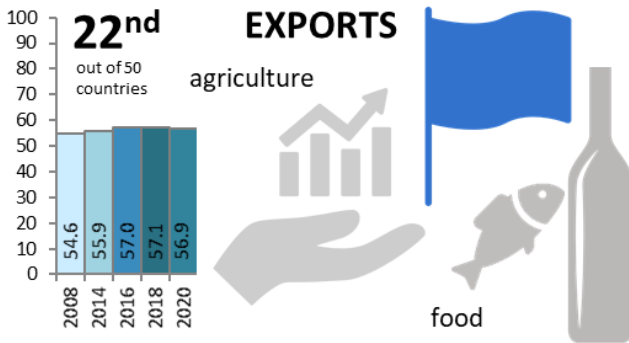
In 2020, Scotland ranked:  
2<sup>nd</sup> in UK  
10<sup>th</sup> in Australia  
11<sup>th</sup> in US



National Indicator: Scotland's reputation



This indicator is based on Scotland's score on Anholt-Ipsos Nation Brands Index<sup>SM</sup>



'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 Index<sup>SM</sup> 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 Index<sup>SM</sup>.

# Executive summary

Scotland's National Outcome for International – as part of the National Performance Framework – is that 'we are open, connected and make a positive contribution internationally'. '**Scotland's reputation**' is one of Scotland's 81 National Performance Framework Indicators<sup>1</sup>. National Indicators enable Scotland to track progress towards the achievement of National Outcomes. The purpose of the Framework 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<sup>2</sup>".

Since 2008, the Scottish Government has used the Anholt-Ipsos Nation Brands Index<sup>SM</sup> (NBI<sup>SM</sup>) to assess and monitor how Scotland is perceived around the world. The NBI<sup>SM</sup> examines the image of 50 countries 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 country's reputation.

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<sup>34</sup>. 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.

Key findings from the 2020 data include<sup>5</sup>:

## *Scotland's overall position*

- Scotland's received an **overall score of 62.6** (out of 100 points) and **ranked 17<sup>th</sup>** (out of 50 nations).

---

<sup>1</sup>[National Performance Framework](#)

<sup>2</sup>[The Government's programme for Scotland - 2018-2019](#)

<sup>3</sup> The rank is informative of a country's reputation relative to other countries, and may change in relation to other countries' performance.

<sup>4</sup> 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.

<sup>5</sup> Increases and decreases have not been significance tested.

- **Scotland's absolute score has stayed fairly stable**, going from 62.7 in 2018 to 62.6 in 2020<sup>6</sup>, and **Scotland's relative rank has decreased by one place since 2018** (from 16<sup>th</sup> in 2018 to 17<sup>th</sup> in 2020). This is because the rank may change in relation to other countries' performance while the absolute score will not<sup>7</sup>.
- While Scotland's score has decreased between 2018 and 2020, the change of 0.1 is below the 1.0 point threshold for Scotland's National Indicator 'Scotland's Reputation', indicating that **Scotland's reputation is 'maintaining'** internationally.

#### *How other countries score and rank Scotland*

- Generally, **perceptions of Scotland were highest amongst Commonwealth and English speaking countries** with the United Kingdom<sup>8</sup>, Australia and the United States ranking Scotland 2<sup>nd</sup>, 10<sup>th</sup> and 11<sup>th</sup> respectively. Between 2018 and 2020, Scotland's reputation improved the most in China, the United Kingdom and India.

#### *Dimensions and attributes*

- **Scotland is rated as a Top 20 country on five of the six dimensions of reputation.** Scotland's strongest dimension in 2020 was Tourism, on which Scotland ranked 12<sup>th</sup> the world, with a score of 68.7 (down from 69.4 in 2018).
- In terms of rank, Scotland's **weakest dimension was Exports** (22<sup>nd</sup>). This is Scotland's only dimension to rank outside of the Top 20. **Exports also received the lowest overall score (56.9).**
- **When looking at score, Culture is Scotland's only improved dimension since 2018**, increasing from 60.0 to 60.7 in 2020. **When looking at rank, Scotland's Culture is also the most improved dimension since 2018** (moving from 19<sup>th</sup> to 16<sup>th</sup> place).
- 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 7<sup>th</sup> out of the 50 nations (and being the highest scoring attribute – 5.4 out of 7.0). Scotland ranked 10<sup>th</sup> in relation to how it protects the environment, 11<sup>th</sup> for how welcoming the people of Scotland are, and its rich cultural heritage; and 12<sup>th</sup> for its rich historic buildings and monuments.

---

<sup>6</sup> Any difference within +/- one point of the previously available figure (Scotland has subscribed to the NBI<sup>SM</sup> 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 improving while an increase of one point or more suggests the position is worsening.

<sup>7</sup> In other words, whilst Scotland's score maintained between 2018 and 2020, other countries' scores increased over this period, resulting in a change in Scotland's relative rank.

<sup>8</sup> The United Kingdom sample includes Scotland.

### *Familiarity and favourability*

- At the start of the NBI<sup>SM</sup> survey, respondents are asked to rate how familiar and how favourable they are towards each country. **Familiarity with Scotland has increased from 61 per cent of respondents having some knowledge of Scotland in 2018 to 67 per cent in 2020.** The most noticeable increase in levels of familiarity was seen from respondents in China, the United States and Australia. **Overall, Scotland's rank remained 21<sup>st</sup> for familiarity.**
- Favourability towards Scotland maintained between 2018 and 2020. All 20 core panel countries gave Scotland a favourability score of more than 4.0 (on a 1.0 to 7.0 point scale) in 2020, suggesting that Scotland is viewed comparatively positively by all panel countries. **Scotland's overall score for favourability was 4.9, and it was ranked 14<sup>th</sup> out of 50** (up by two places since 2018).

### *Demographic trends*

- **Women tended to have a more positive image of Scotland than men**, scoring Scotland higher than men across four of the six dimensions.
- **Overall, individuals in the 45 years and over and 30 to 44 years age group tended to have a more positive image of Scotland than individuals in the 18 to 29 year age group**, with those aged 45 years and over scoring Scotland higher than the other age groups across four out of the six dimensions.
- **The more exposure people 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.**
- **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*

- **Scotland scored itself higher in 2020 than it did in 2018, and continues to rank itself 1<sup>st</sup> out of the 50 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"<sup>9</sup>.

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 Nations Brands Index<sup>SM</sup> (NBI<sup>SM</sup>) to measure Scotland's reputation internationally. Conducted annually since 2008, the NBI<sup>SM</sup> examines the reputation of 50 countries. Each year, approximately 20,000 adults, aged 18 and over, in 20 core panel countries are interviewed online. The 20 panel countries have not changed between 2018 and 2020, but the 50 nations whose reputation is measured do change between years. See the methodology report found in the supporting files, alongside this publication for further details.

The NBI<sup>SM</sup> attempts to measure and rank a country's broad reputation along six dimensions of national competence, all of which are weighted equally. Scotland's NBI<sup>SM</sup> 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.

---

<sup>9</sup> [National Performance Framework](#)

The **rank**<sup>10</sup> is informative of a country's reputation relative to other countries, and may change in relation to other countries' performance.

The **score**<sup>11</sup> may be regarded as a reliable indicator of a country's reputation over time.

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 perceptions compare with those of respondents from other countries included in the NBI<sup>SM</sup>.

While being the best available measure of Scotland's reputation for the purpose of the NPF, the NBI<sup>SM</sup> does not provide an evaluation of the Scottish Government's policies. NBI<sup>SM</sup> 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 and 2020. Scotland did not subscribe to the 2011, 2013, 2017 and 2019 surveys, but was included in the sample of 50 evaluated countries in these years.

This report will compare the 2020 data to the most recent previously available data in 2018, 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 Index<sup>SM</sup>: 2020 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 NBI<sup>SM</sup> score as it compares to that of the previous year. An increase of one point or more in Scotland's absolute NBI<sup>SM</sup> score suggests that the indicator is "improving", whereas a decrease of one point or more in Scotland's absolute NBI<sup>SM</sup> 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 NBI<sup>SM</sup> score if it exceeds one point, otherwise it will treat the indicator as "maintaining".

In 2020, a number of questions were added to the Anholt-Ipsos NBI<sup>SM</sup> survey in response to the COVID-19 pandemic. These looked at how nations around the world perceive

---

<sup>10</sup> All rankings presented in the report are out of 50.

<sup>11</sup> 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).



Scotland's response to healthcare crises (including COVID-19) and, with that in mind, how comfortable respondents would be visiting Scotland in the next five years. This data will not be discussed in this report and does not contribute towards Scotland's NBI<sup>SM</sup> score or rank. See the International Perceptions of Scotland's Response to Covid-19 report found in the supporting files, alongside this report for more details.

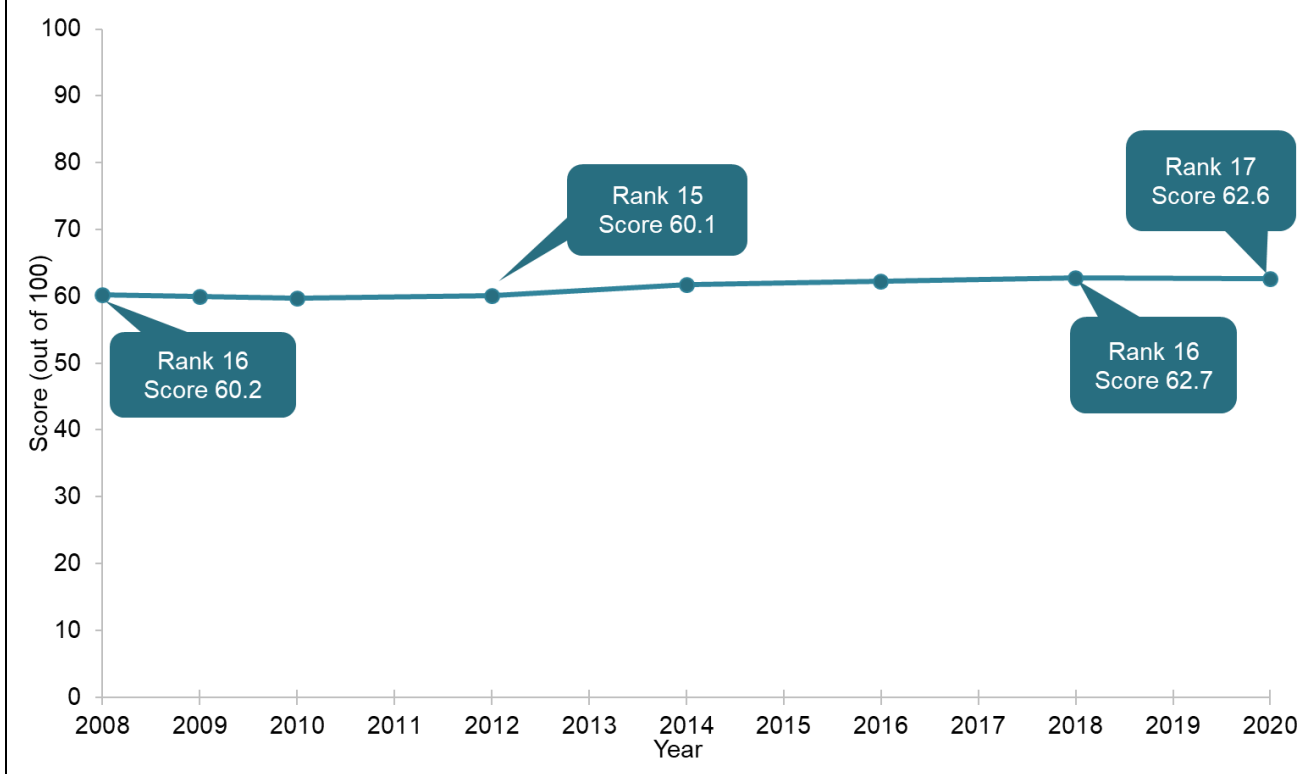
# Scotland's reputation overall

## Scotland's position on the NBI<sup>SM</sup>

Scotland's 2020 score of 62.6<sup>12</sup> and rank of 17<sup>th</sup> places Scotland in the Top 20 countries and indicates that Scotland has a high level of international recognition<sup>13</sup>. Scotland's overall reputation in terms of the NBI<sup>SM</sup> score has maintained<sup>14</sup> between 2018 and 2020 (62.7 and 62.6 respectively). Figure 1 shows that Scotland's relative rank has decreased by one place since 2018 (from 16<sup>th</sup> in 2018 to 17<sup>th</sup> in 2020). This is because the rank may change in relation to other countries' performance while the absolute score will not.

When looking at scores, Scotland's reputation maintained between 2008 (when Scotland joined the survey) and 2012, and then improved between 2012 and 2020. See Figure 1.

**Figure 1: NBI<sup>SM</sup> Scotland's international reputation by score and rank (2008-2020)**



Scotland's score of 62.6 places Scotland in the 7<sup>th</sup> decile<sup>15</sup>, far closer to the country with the top score of 69.1 than the country with the bottom score of 47.4. Countries that did

<sup>12</sup> The NBI<sup>SM</sup> score is an average of the scores from the six NBI<sup>SM</sup> dimensions.

<sup>13</sup> Figures have been rounded to one decimal place.

<sup>14</sup> 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 improving while an increase of one point or more suggests the position is worsening.

<sup>15</sup> 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.

better than Scotland and ranked in the Top 10 were Germany, United Kingdom, Canada, Japan, France, Italy, Switzerland, Sweden, Australia, and the United States.

Table 1 shows how people in different demographic groups score and rank Scotland. With regard to gender, women tended to score Scotland's reputation higher than men (63.0 and 62.2 respectively). Notably, respondents in the 45 years or over age group (63.8) and 30 to 44 years age group (63.0) tended to score Scotland's reputation higher than respondents between the ages of 18 and 29 years (60.6).

In relation to occupation, the data only allow disaggregation between business/executives and other occupations. Those in the former group tended to view Scotland more positively in terms of Scotland's reputation score (66.1) than those in other occupations (61.1). However, across the NBI<sup>SM</sup> dataset, business/executives tended to give all countries a higher score overall (on average 4.7 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 (64.5) or having visited Scotland for business and/or holiday (63.6), scored Scotland's reputation higher than those with little or no exposure to Scotland. Those who had visited Scotland also ranked Scotland more favourably. See Table 1.

**Table 1: Scotland's international reputation by gender, gender, age, occupation and tourism (2020)**

	Rank	Score
<b>Gender</b>		
Male	16	62.2
Female	15	63.0
<b>Age</b>		
18-29	17	60.6
30-44	17	63.0
45+	14	63.8
<b>Occupation</b>		
Business/Executives	17	66.1
Other	15	61.1
<b>Visited Scotland</b>		
Yes	15	63.6
No	17	58.9
<b>Visited a Scottish Website</b>		
Yes	16	64.5
No	16	59.1

In nearly every one of Scotland's dimensions and their underlying attributes, similar patterns were seen across these 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 countries<sup>16</sup>

In 2020 Scotland received its highest overall scores for reputation from India (70.4), China (69.2) and the United Kingdom<sup>17</sup> (67.8). The lowest overall scores for Scotland were received from Japan (53.9), South Korea and Turkey (both scoring Scotland 55.5).

Figure 2 shows Scotland's 2020 rank by each of the 20 core panel countries, and how this compares with 2018. In 2020 the highest overall ranks for Scotland were received from the United Kingdom (2<sup>nd</sup>), Australia (10<sup>th</sup>) and the United States (11<sup>th</sup>). The lowest overall ranks for Scotland were received from Egypt (27<sup>th</sup>), India (22<sup>nd</sup>), Mexico, Russia, South Korea and Turkey (all ranking Scotland 21<sup>st</sup>).

Scotland's score in 2020 was higher in seven countries than it had been in 2018, most notably in China and the United Kingdom. However, Scotland's score was lower in 13 countries in 2020 than it had been in 2018, with the biggest decrease recorded by South Korea.

In eight countries (Germany, United Kingdom, Poland, Argentina, Australia, Italy, Russia, and Turkey) Scotland's rank was higher in 2020 than it was in 2018. Scotland's rank remained stable in four countries (China, South Korea, Sweden and the United States) and was lower in eight countries (India, Canada, Mexico, South Africa, Japan, France, Egypt and Brazil) between 2018 and 2020. See Figure 2.

In two countries (Egypt and India) Scotland's rank was lower in 2020 compared to 2018, but the reputational scores were higher. In Germany, Poland, Argentina, Italy and Turkey the score was lower in 2020, but the rank was higher.

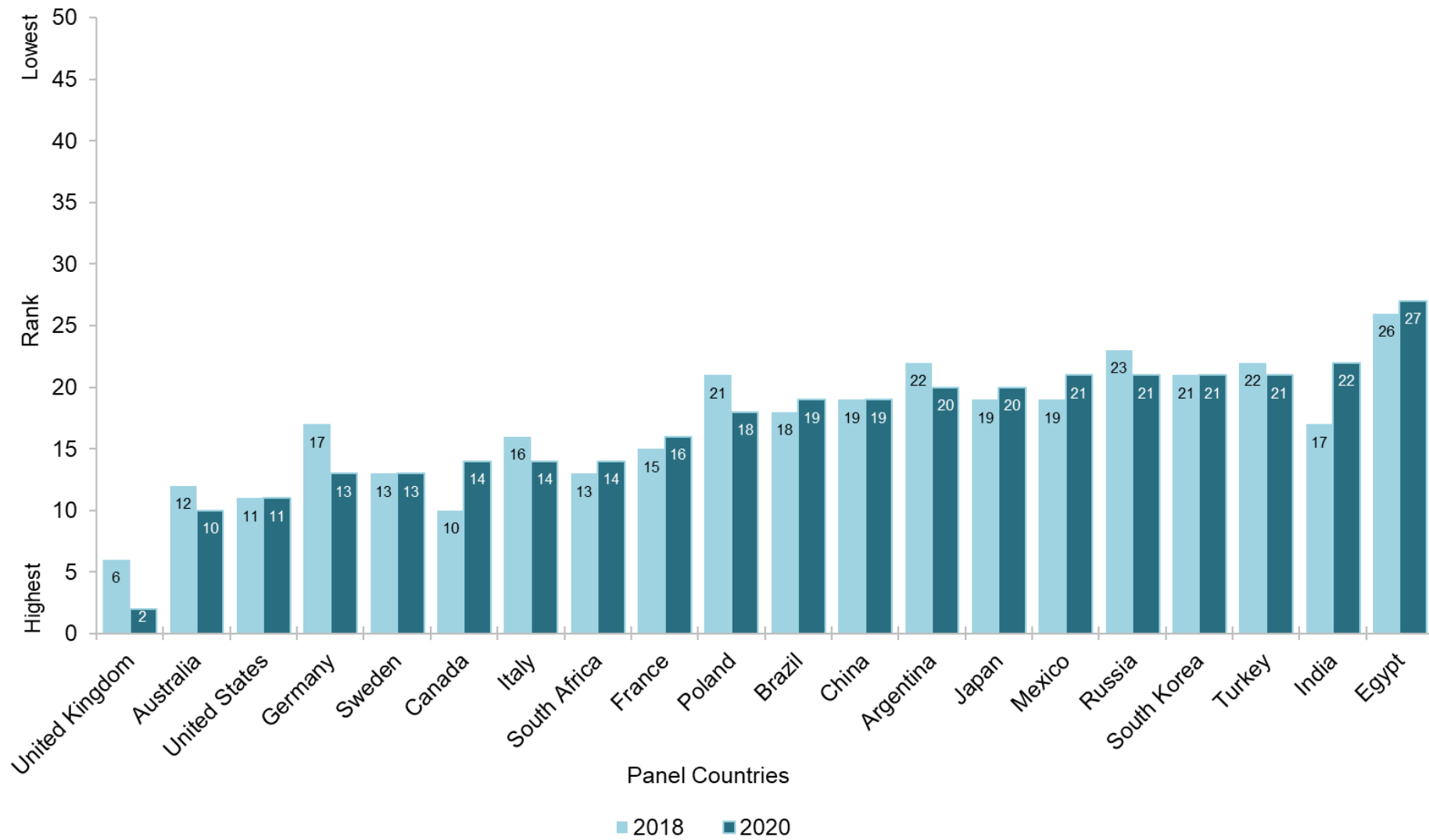
We can see from the results above that the distribution of scores can vary considerably depending on the particular panel country. For example, Scotland received its highest overall score from India (70.4) however this contrasted with India's relatively low rank for Scotland (22<sup>nd</sup>). This tells 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.

---

<sup>16</sup> The 20 core panel countries do not include Scotland as a panel country.

<sup>17</sup> The United Kingdom sample includes Scotland.

**Figure 2: NBI<sup>SM</sup> Scotland's rank by 20 panel countries (2018 and 2020)**



## Familiarity with Scotland

At the start of the NBI<sup>SM</sup> 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 2020 the NBI<sup>SM</sup> panel countries were on average more familiar with Scotland than the 2018 sample. Sixty-seven per cent of respondents reported being familiar with Scotland, resulting in a familiarity ranking of 21 out of 50. Whilst Scotland's ranking has maintained over this period there has been an increase in score: in 2018, 61 per cent of respondents reported being familiar with Scotland.

**Table 2: NBI<sup>SM</sup> Familiarity with Scotland (2018 and 2020)**

	Familiarity	
	Rank	Score
2018	21	61
2020	21	67

### Variations between panel countries

Figure 3 shows levels of familiarity with Scotland across the 20 panel countries in 2018 and 2020. European countries tended to be the most familiar with Scotland in 2020 with 93 per cent of respondents from the United Kingdom<sup>18</sup>, 85 per cent from Russia, 79 per cent from Sweden having at least some knowledge of Scotland. Seventy-nine 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, France was the fourth least familiar with Scotland (52 per cent) in 2020. Nonetheless, France's 50-nation average familiarity score of 47 per cent demonstrates that respondents from France have low levels of familiarity with the 50 measured nations. However, respondents from France are more familiar with Scotland than with most of the measured nations, ranking it 13<sup>th</sup>.

Between 2018 and 2020, levels of familiarity with Scotland increased the most in China (63 per cent in 2018 to 74 per cent in 2020), the United States (59 per cent in 2018 to 68 per cent in 2020) and Australia (70 per cent in 2018 to 79 per cent in 2020). Levels of familiarity decreased the most in India and Mexico, dropping by three percentage points each. See Figure 3.

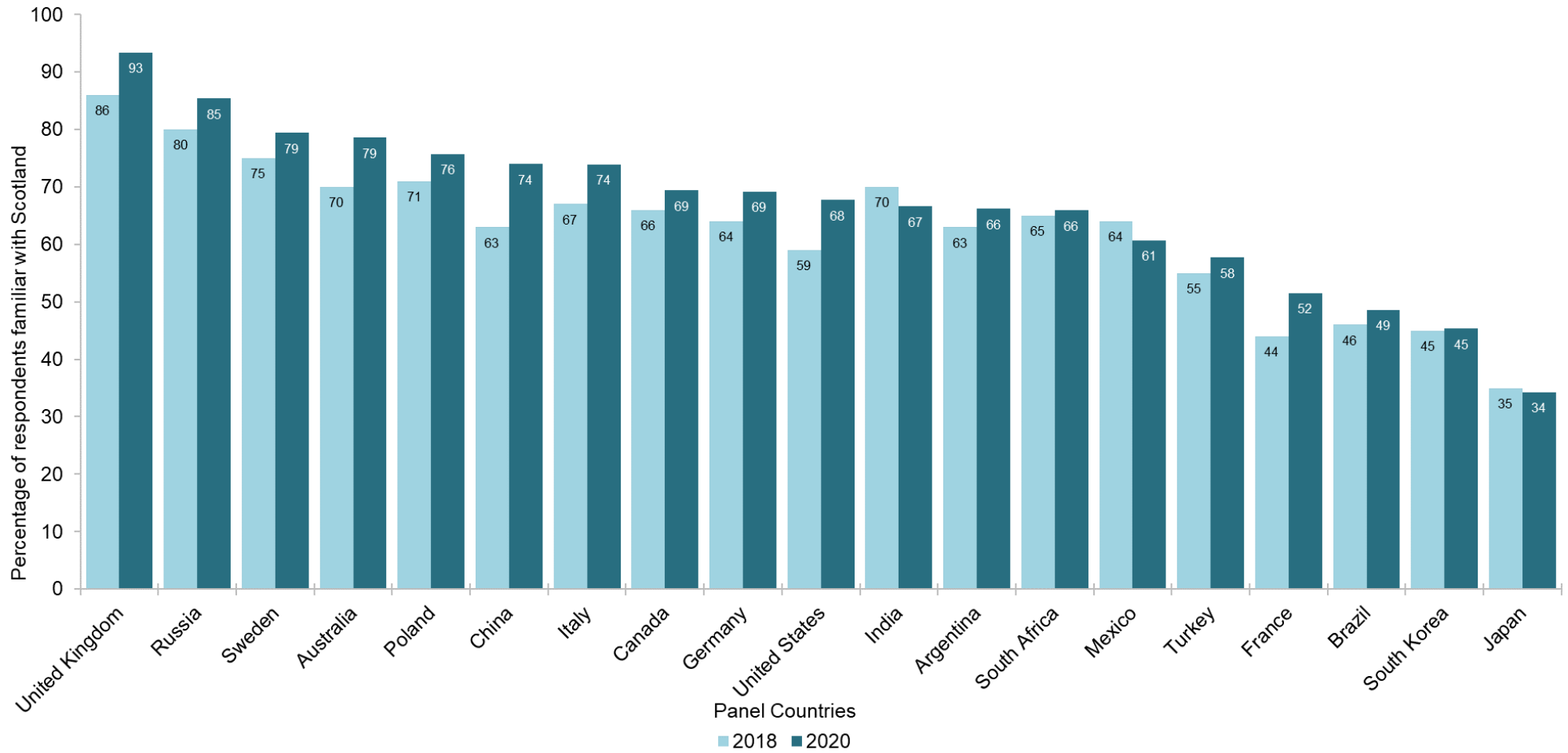
Western European and Central/Eastern European countries showed the greatest familiarity with Scotland in 2020, both with an average familiarity score of 73 per cent, followed by North American countries (69 per cent). Scotland received its lowest familiarity score from Latin American countries (59 per cent).

---

<sup>18</sup> The United Kingdom sample includes Scotland.

All geographical regions showed an increase in familiarity with Scotland between 2018 and 2020. Familiarity with Scotland in the Western European and North American countries increased the most during this period, increasing from 67 percent in 2018 to 73 per cent in 2020, and from 63 percent in 2018 to 69 percent in 2020 respectively.

**Figure 3: NBI<sup>SM</sup> Levels of familiarity with Scotland (2018 and 2020)**





## Favourability towards Scotland

At the start of the NBI<sup>SM</sup> 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)<sup>19</sup>.

Table 3 shows that Scotland was rated relatively highly in terms of favourability (score of 4.9 out of 7.0) with a rank of 14<sup>th</sup> out of 50 participating nations. Whilst Scotland's favourability score has maintained since 2018, its rank has jumped two places from 16<sup>th</sup> to 14<sup>th</sup>.

**Table 3: NBI<sup>SM</sup> Favourability towards Scotland (2018 and 2020)**

	Favourability	
	Rank	Score
2018	16	4.9
2020	14	4.9

## Variations between panel countries

Figure 4 shows levels of favourability towards Scotland across the 20 panel countries in 2018 and 2020. None of the 20 core panel countries gave Scotland a favourability score of four (on a scale of 1.0 to 7.0) or less in 2020. This suggests that Scotland is viewed comparatively positively by all panel countries.

The countries that tended to be the most favourable towards Scotland in 2020, were the United Kingdom<sup>20</sup> (5.6), Australia, Russia and Canada (all scoring Scotland 5.2). Japan was the least favourable towards Scotland, scoring Scotland 4.3 out of 7.0 in 2020. Even though Japan was 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 4.

In 2020, the NBI<sup>SM</sup> panel countries were just as favourable towards Scotland as the 2018 sample (average favourability score of 4.9 out of 7.0 in both 2018 and 2020). The greatest increase in favourability towards Scotland during this period could be found in China (4.7 to 5.1), while the greatest decline in favourability towards Scotland was in Poland, Mexico, Argentina, South Korea, Turkey, Japan, Italy (all decreasing by 0.1 points). See Figure 4.

Geographical regions range in favourability from 5.1 in Western European and North American countries, followed by Latin American and Middle East/African (4.9) with Central/Eastern European and Asia/Pacific countries scoring Scotland 4.8 out of 7.0.

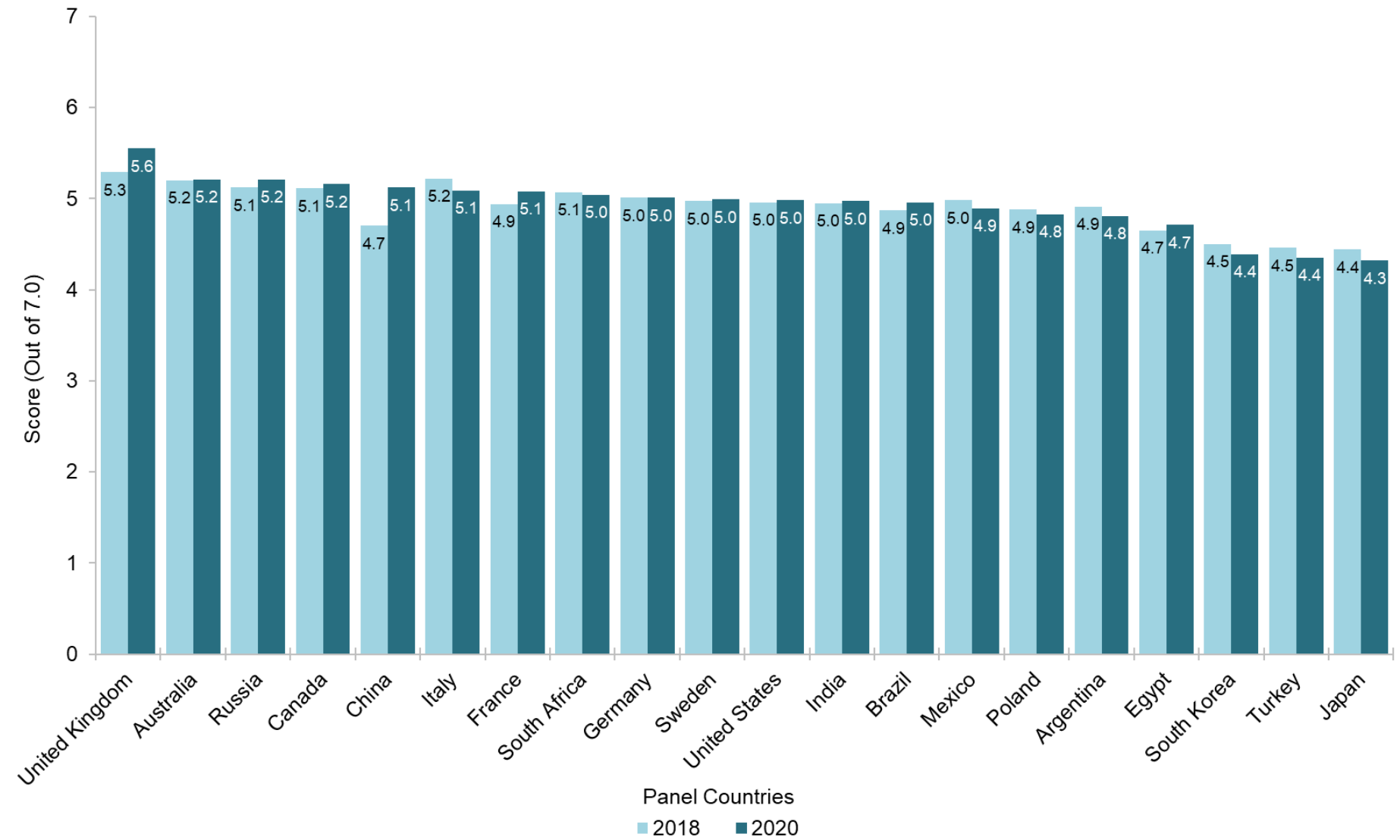
---

<sup>19</sup> 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.

<sup>20</sup> The United Kingdom sample includes Scotland.

Between 2018 and 2020 there was little to no difference in geographical regions' favourability towards Scotland. Levels of favourability towards Scotland either increased by 0.1 points or maintained over this period.

**Figure 4: NBI<sup>SM</sup> Levels of favourability towards Scotland (2018 and 2020)**



# Scotland's six dimensions of reputation

The Anholt-Ipsos NBI<sup>SM</sup> explores a country's image by examining six dimensions of national competence, all of which are weighted equally and together to make up the NBI<sup>SM</sup> score<sup>21,22</sup>. 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.



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

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

**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.

<sup>21</sup> The NBI<sup>SM</sup> score is an average of the scores from the six NBI<sup>SM</sup> 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.

<sup>22</sup> 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 5 displays Scotland's 2018 and 2020 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 2018 results.

In 2020, Scotland's rank, relative to 2018, was higher on four of the six dimensions (Exports, Governance, Culture, and Immigration and Investment) and maintained on the People and Tourism dimensions. See Figure 5.

Scotland's most positive dimension in terms of rank in 2020 was Tourism, which placed Scotland 12<sup>th</sup> out of 50 countries, while Scotland's least positive dimension was Exports (22<sup>nd</sup>). Exports was Scotland's only dimension to rank outside of the Top 20. See Figure 5.

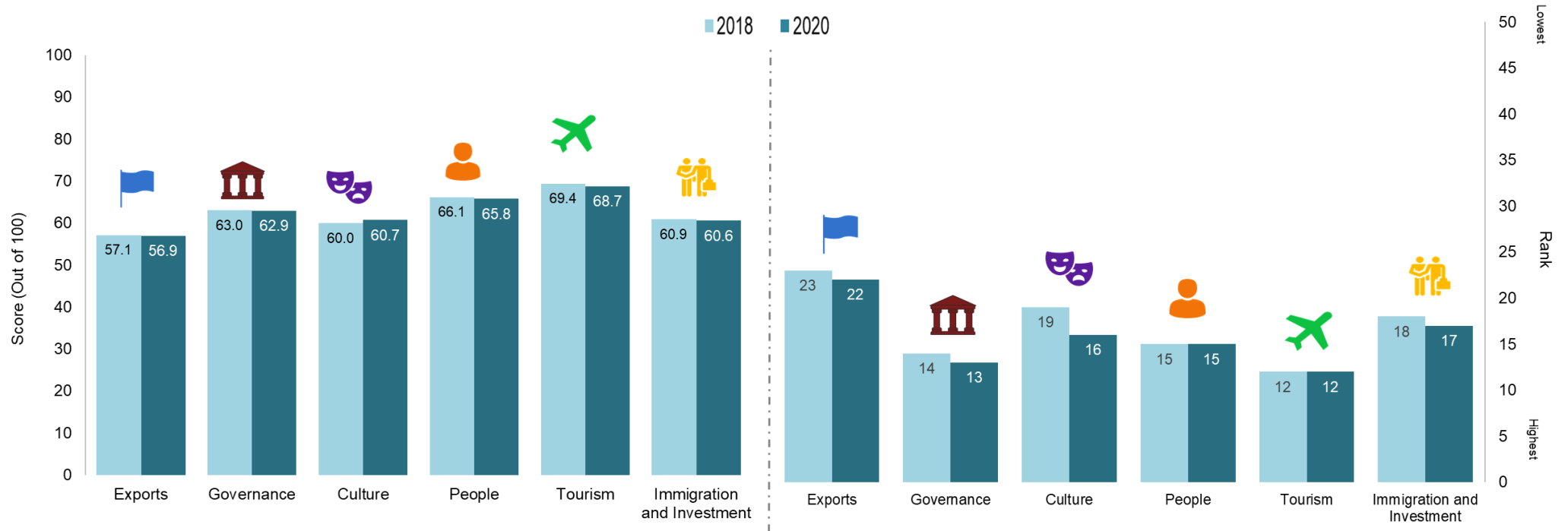
Figure 6 (see next page) illustrates the difference in average scores across the six dimensions given to Scotland by the different geographic regions of the world. Middle East and Africa, on average, scored Scotland the highest (64.5) followed by North America (63.4). Central and Eastern Europe scored Scotland the lowest (60.0).

The following section investigates each of the six dimensions in turn<sup>23</sup>.

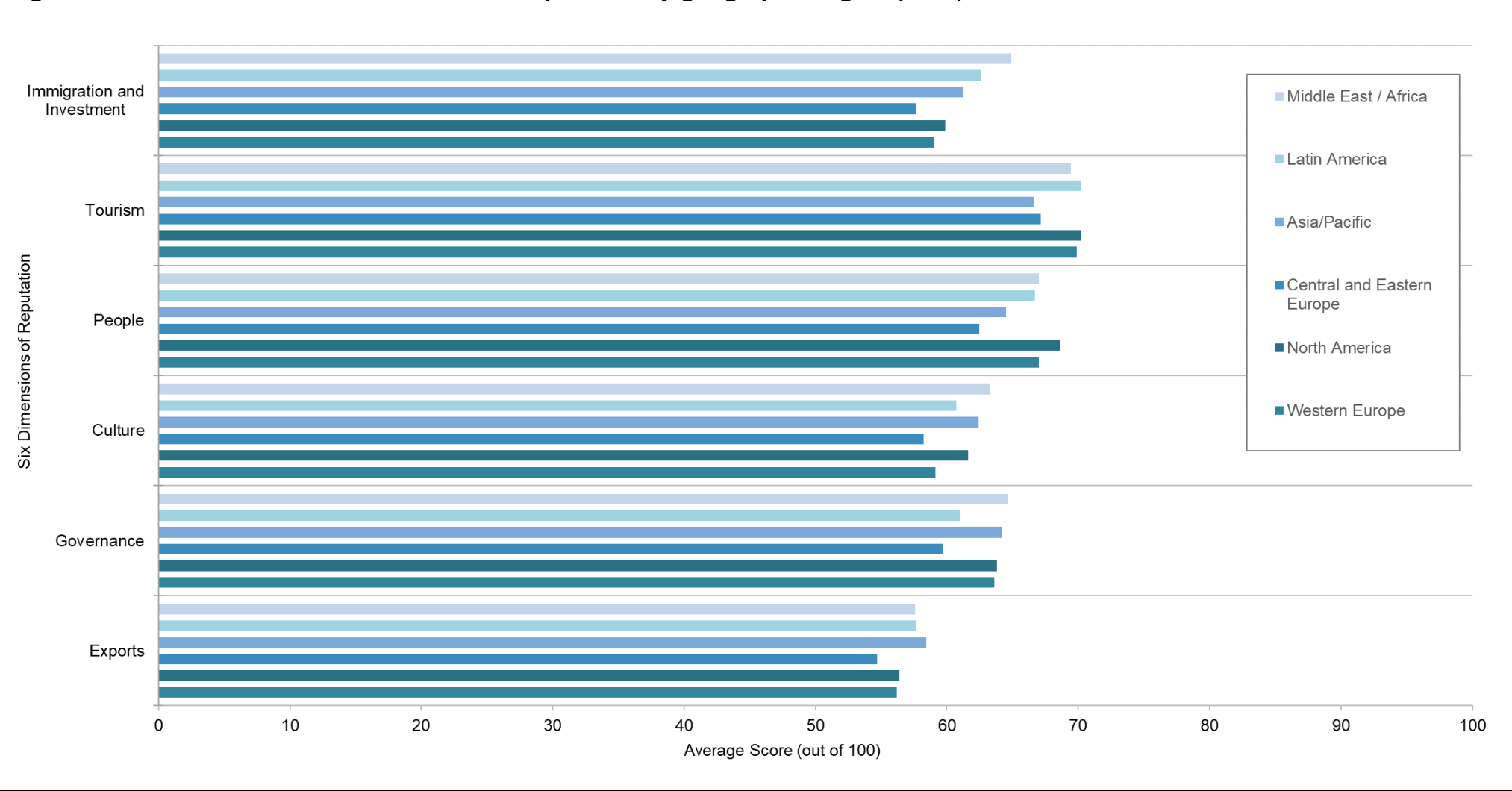
---

<sup>23</sup> 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 5: NBI<sup>SM</sup> Scotland's performance across the six dimensions of reputation (2018 and 2020)**



**Figure 6: NBI<sup>SM</sup> Scotland's six dimensions of reputation by geographic region (2020)**



## 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 56.9 for the Exports dimension (57.1 in 2018). This gave Scotland a ranking of 22<sup>nd</sup> out of the 50 participating nations in 2020 (up from 23<sup>rd</sup> in 2018). This is the lowest score and rank that Scotland received for any dimension.

**Table 4: NBI<sup>SM</sup> Scotland's reputation for Exports (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>Exports Overall</b>	23	57.1	22	56.9
Contribution to innovation and science	25	4.2	24	4.2
Products and services	19	4.5	18	4.5
Country as a creative place	23	4.5	21	4.4

The countries which gave Scotland the highest rankings for Exports overall were the United Kingdom<sup>24</sup> (7<sup>th</sup>) and the United States (12<sup>th</sup>). The countries which gave Scotland the lowest rankings for Exports were Egypt (33<sup>rd</sup>) and South Africa (26<sup>th</sup>).

### Exports attributes<sup>25</sup>

The scores for each of Scotland's attributes in the Exports dimension were very similar in 2020. The highest scoring attribute in the Exports dimension was Products and services (receiving a score of 4.5 out of 7.0). Whilst the scores across all three attributes have remained relatively stable between 2018 and 2020, the ranks have all improved by at least one point<sup>26</sup>. See Table 4.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its products and services (18<sup>th</sup>). However, Scotland's Contribution to innovation and science (24<sup>th</sup>), and Country as a creative place (21<sup>st</sup>), ranked outside the Top 20. Contribution to innovation and science is Scotland's lowest ranked attribute across the six dimensions. See Table 4.

<sup>24</sup> The United Kingdom sample includes Scotland.

<sup>25</sup> 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).

<sup>26</sup> This is because rank is responsive to changes in the sample of countries being evaluated while absolute score is not.



## 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 7 shows the products or services that were most commonly associated with Scotland. These were 'Agriculture' (26 per cent) followed by 'Food' (22 per cent) and 'Crafts' (17 per cent), whilst the least commonly associated words were 'Automotive' (five per cent) and 'Oil' (six per cent each). Thirty-five per cent of respondents selected 'None of these'.

**Figure 7: Products or services most associated with Scotland (2020)**



## 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 13<sup>th</sup> across all 50 countries in the Index. Table 5 shows that Scotland's score for the Governance dimension decreased slightly, from 63.0 in 2018 to 62.9 in 2020, but its rank increased by one place (from 14<sup>th</sup> in 2018 to 13<sup>th</sup> in 2020).

**Table 5: NBI<sup>SM</sup> Scotland's reputation for Governance (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>Governance Overall</b>	14	63.0	13	62.9
Competent and honest	15	4.8	13	4.8
Fair and respectful of citizens' rights	14	5.0	12	5.0
International peace and security	14	4.8	12	4.9
Environmental protection	14	4.8	10	4.8
Efforts to reduce global poverty	14	4.4	14	4.4

The countries which gave Scotland the highest rankings for Governance overall were the United Kingdom<sup>27</sup> (3<sup>rd</sup>), the United States (7<sup>th</sup>) and Australia (9<sup>th</sup>). The countries which gave Scotland the lowest rankings for Governance were India (22<sup>nd</sup>), Egypt (20<sup>th</sup>), and South Korea (19<sup>th</sup>).

### Governance attributes<sup>28</sup>

Scotland's attribute scores for the Governance dimension ranged from 4.4 (Efforts to reduce global poverty) to 5.0 (Fair and respectful of citizens' rights). These scores were all very similar to those observed in 2018. See Table 5.

When attribute scores were compared to other participating nations, Scotland ranked within the Top 15 for all the Governance attributes. The only attribute which did not improve its ranking between 2018 and 2020 was Efforts to reduce global poverty (maintained at 14<sup>th</sup>). See Table 5.

<sup>27</sup> The United Kingdom sample includes Scotland.

<sup>28</sup> 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 8 shows the adjectives that were most commonly used to describe Scotland's Government<sup>29</sup>. The most commonly used adjectives were 'Reliable' (33 per cent) followed by 'Trustworthy' (29 per cent), the least common adjectives being 'Dangerous' (two per cent) and 'Corrupt' (three per cent). Twenty-two per cent of respondents selected 'None of these'.

**Figure 8: Words associated with the government of Scotland (2020)**



<sup>29</sup> 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 60.7 for the Culture dimension in 2020, up 0.8<sup>30</sup> points since 2018, making this Scotland's only dimension score to improve since 2018. Scotland's rank also increased by three places since 2018 from 19<sup>th</sup> to 16<sup>th</sup>. See Table 6.

**Table 6: NBI<sup>SM</sup> Scotland's reputation for Culture (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>Culture Overall</b>	19	60.0	16	60.7
Excellence at sports	29	4.1	23	4.2
Cultural heritage	12	5.0	11	5.1
Contemporary culture	17	4.6	14	4.6

Scotland received its highest rank from the United Kingdom<sup>31</sup> (6<sup>th</sup>) and Australia (11<sup>th</sup>). South Korea had the least favourable perception of Scotland's Cultural reputation, ranking Scotland 27<sup>th</sup> out of 50 nations.

### Culture attributes<sup>32</sup>

Scotland's attribute scores for the Culture dimension ranged from 4.2 (Excellence at sports) to 5.1 (Cultural heritage) in 2020 and varied very little or not at all from 2018. The attribute Excellence at sports was one of Scotland's lowest scoring attributes. See Table 6.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its Cultural heritage (11<sup>th</sup>) and Contemporary Culture (14<sup>th</sup>), both placing in the Top 15. However, Excellence at sports ranked outside the Top 20 at 23<sup>rd</sup>. See Table 6.

<sup>30</sup> Figures may not add up due to rounding.

<sup>31</sup> The United Kingdom sample includes Scotland.

<sup>32</sup> 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 9 shows the cultural activities or products that were most commonly expected to see produced in Scotland<sup>33</sup>. These were 'Museums' (29 per cent) and 'Music' (24 per cent), whilst the least commonly expected cultural activities or products were 'Circus' (six per cent) and 'Pop Videos' (eight per cent). Thirty-one per cent of respondents also selected 'None of These'.

**Figure 9: Cultural activities or products most expected to see produced in Scotland (2020)**



<sup>33</sup> 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 15<sup>th</sup> across all 50 countries in the Index. Table 7 shows that in 2020 Scotland received an overall score of 65.8 a decrease from 2018 (66.1). Nonetheless, Scotland continues to be highly regarded for its People, featuring in the Top 15 countries overall since 2018.

**Table 7: NBI<sup>SM</sup> Scotland's reputation for People (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>People Overall</b>	15	66.1	15	65.8
Make you feel welcome	11	4.9	11	4.9
Friendly	14	4.9	13	4.9
Valuable employees	18	5.0	17	5.0

The countries which ranked Scotland's People dimension the highest were Australia and the United Kingdom<sup>34</sup>, both ranking Scotland 5<sup>th</sup>. The countries which ranked Scotland the lowest on this dimension were Turkey and India (both ranking Scotland 26<sup>th</sup>).

### People attributes<sup>35</sup>

Scotland's attribute scores for the People dimension were all very similar in 2020 and showed no change from 2018. The highest scoring attribute in the People dimension was Valuable employees (5.0). See Table 7.

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. See Table 7.

<sup>34</sup> The United Kingdom sample includes Scotland.

<sup>35</sup> 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 10 shows the adjectives that were most commonly used to describe people in Scotland<sup>36</sup>. These were 'Hard-working' (28 per cent) followed by 'Honest' (25 per cent) and 'skilful' (22 per cent), whilst the least commonly used adjectives were 'Ignorant' and 'Unreliable' (three per cent each). Twenty-six per cent of respondents also selected 'None of These'. These proportions were all similar to those observed in 2018.

**Figure 10: Words associated with the people of Scotland (2020)**



<sup>36</sup> 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 decreased from 69.4 in 2018 to 68.7 in 2020. However, Tourism remains as Scotland's strongest dimension, ranking 12<sup>th</sup> out of the 50 participating countries in both 2020 and 2018. This dimension received the highest rank and score.

**Table 8: NBI<sup>SM</sup> Scotland's reputation for Tourism (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>Tourism Overall</b>	12	69.4	12	68.7
Would visit if money were no object	13	5.3	14	5.2
Natural beauty	7	5.4	7	5.4
Historic buildings and monuments	12	5.1	12	5.0
Vibrant cities and urban attractions	22	4.8	18	4.8

The United Kingdom<sup>37</sup>, Germany, Australia, France, Sweden, United States and Italy all ranked Scotland in the Top 10 nations for Tourism, whilst Egypt (30<sup>th</sup>) and India (24<sup>th</sup>) ranked Scotland the lowest.

### Tourism attributes<sup>38</sup>

Scotland's attribute scores for the Tourism dimension range from 4.8 (Vibrant cities and urban attractions) to 5.4 (Natural Beauty) and varied very little from 2018. See Table 8.

Natural beauty continues to be perceived as Scotland's strongest characteristic, ranking 7<sup>th</sup> comparing attribute scores with other participating nations. Scotland was ranked in the Top 15 nations for the attributes Historic buildings and monuments (12<sup>th</sup>) and Would visit if money were no object (14<sup>th</sup>). See Table 8.

<sup>37</sup> The United Kingdom sample includes Scotland.

<sup>38</sup> 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 11 shows the words that were most commonly associated with the experience of visiting Scotland<sup>39</sup>. These were 'Fascinating' (30 per cent), 'Relaxing' (27 per cent) and 'Exciting' (26 per cent), whilst the least commonly associated words were 'Risky' and 'Depressing' (three per cent each). Twenty per cent of respondents also selected 'None of these'.

Figure 11: Words associated with the experience of visiting Scotland (2020)



<sup>39</sup> 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 decreased from 60.9 in 2018 to 60.6 in 2020. Scotland was ranked 17<sup>th</sup> out of 50 participating nations in 2020, up one rank from 2018 (18<sup>th</sup>). See Table 9.

**Table 9: NBI<sup>SM</sup> Scotland's reputation for Immigration and Investment (2018 and 2020)**

	2018		2020	
	Rank	Score	Rank	Score
<b>Immigration and Investment Overall</b>	18	60.9	17	60.6
Willingness to live and work	14	4.5	14	4.4
Quality of life	18	5.0	17	5.0
Educational qualifications	19	4.7	18	4.7
Business to invest in	20	4.3	17	4.2
Equal opportunity	13	4.8	12	4.7

The countries which gave Scotland the highest rankings for Immigration and Investment were the United Kingdom<sup>40</sup> (4<sup>th</sup>), Australia and the United States which both ranked Scotland 9<sup>th</sup>. Similar to many of the dimensions discussed previously, Scotland received its lowest rank from Egypt (22<sup>nd</sup>) followed by Turkey and Japan (both ranking Scotland 20<sup>th</sup>).

### Immigration and Investment attributes<sup>41</sup>

Scotland's attribute scores for Immigration and Investment ranged from 4.2 (Business to invest in) to 5.0 (Quality of life). All of the Immigration and Investment attributes have either maintained or decreased in score by 0.1 points between 2018 and 2020. 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, and all attributes have increased their rank since 2018 apart from Willingness to live and work which has maintained at 14<sup>th</sup> place. See Table 9.

<sup>40</sup> The United Kingdom sample includes Scotland.

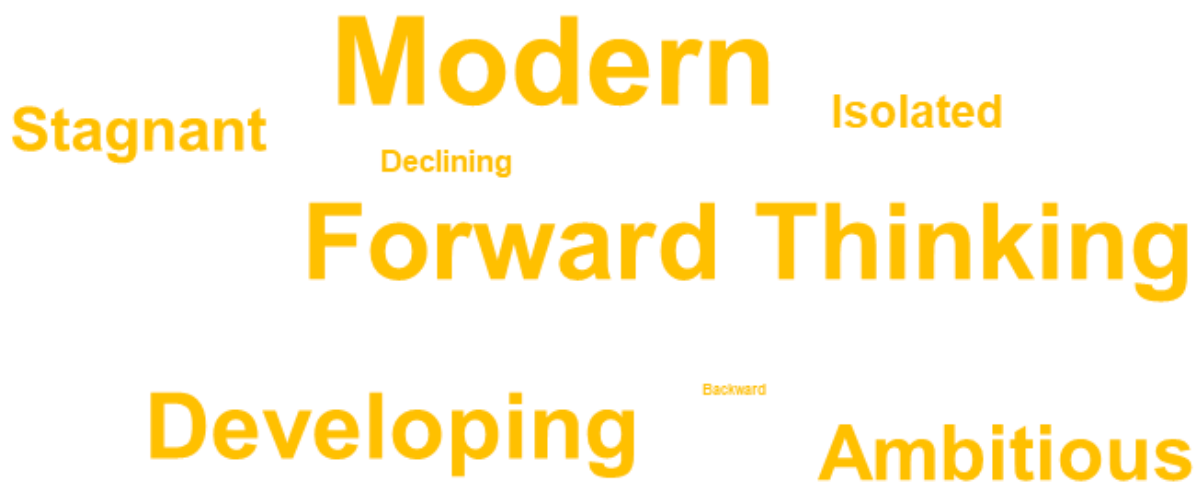
<sup>41</sup> The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high).

## 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 12 shows the words that were most commonly associated with Scotland's economic and business conditions<sup>42</sup>. These were 'Modern' (23 per cent), 'Forward-thinking' (21 per cent) and 'Developing' (20 per cent), whilst the least commonly associated words were 'Backward' (four per cent) and 'Declining' (five per cent). Twenty-six per cent of respondents selected 'None of These'.

**Figure 12: Words associated with Scotland's economic and business conditions (2020)**



<sup>42</sup> 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).

# How Scotland sees itself

In the 2010, 2012, 2014, 2016, 2018 and 2020 NBI<sup>SM</sup> surveys, Scotland was included as an additional core panel country, with 500 interviews carried out in Scotland, to explore how Scotland sees itself<sup>43</sup>. Figure 13 illustrates how Scotland has scored itself since 2010.

Scotland scored itself higher in 2020 than it did in 2018 and it's ranking of 1<sup>st</sup> maintained over this period. In 2018, Scotland scored itself 72.7 while in 2020 Scotland gave itself a score of 75.9. See Figure 13.

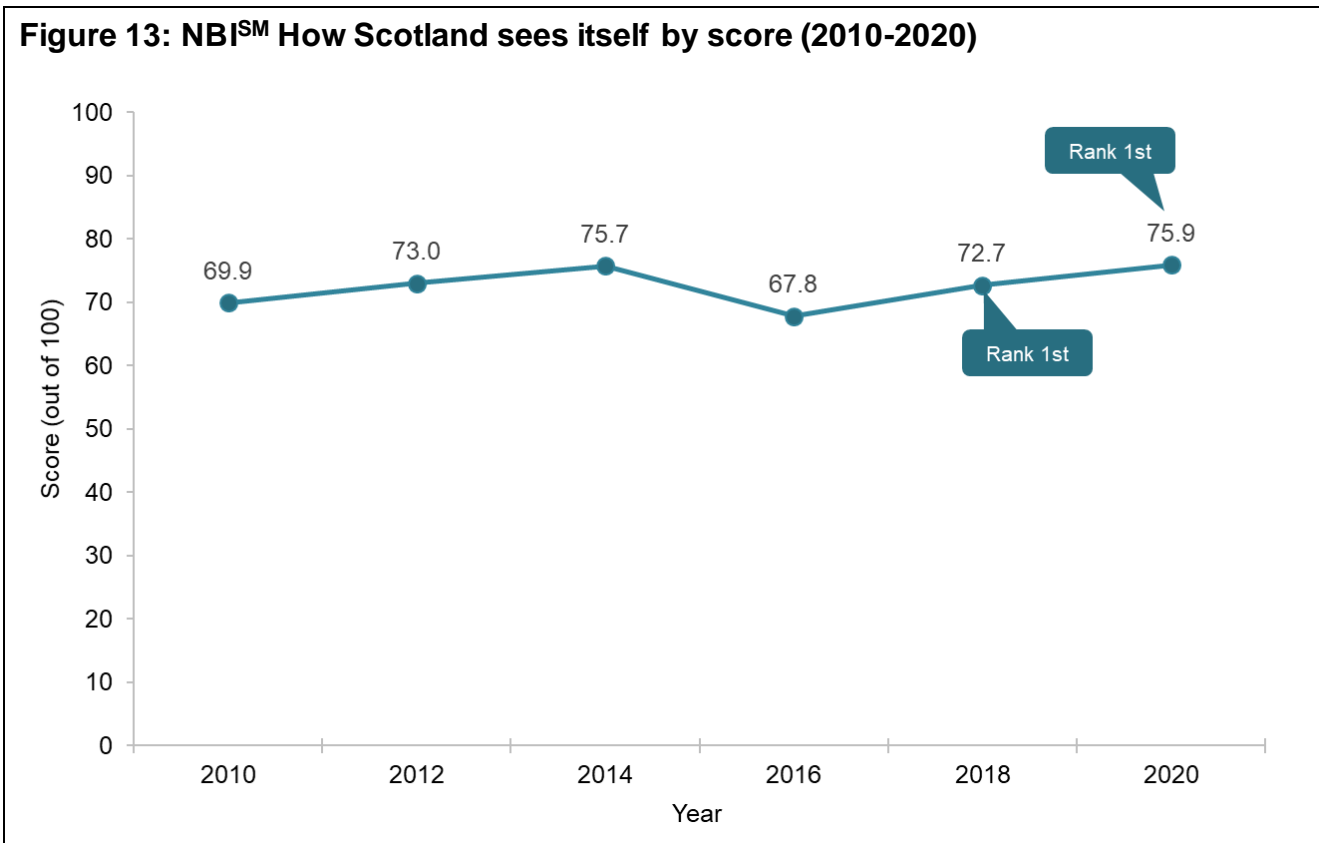
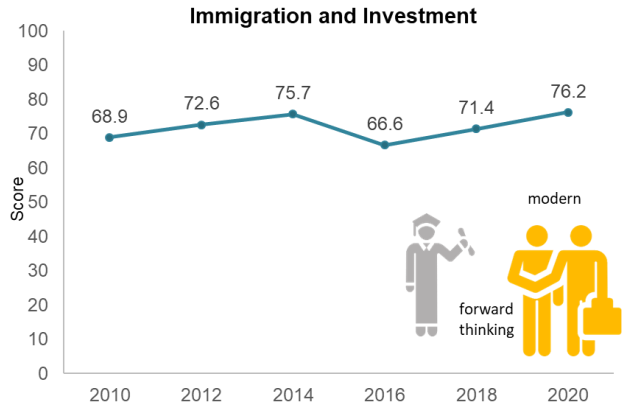
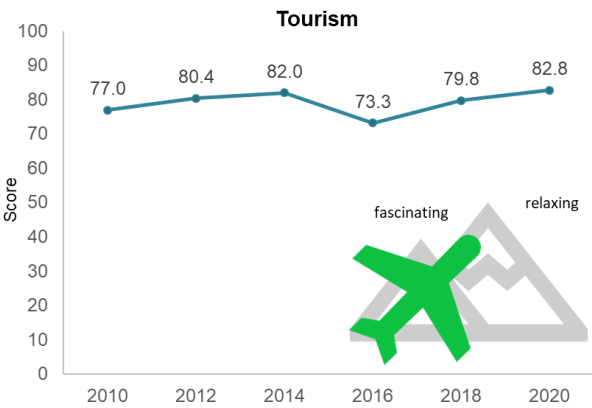
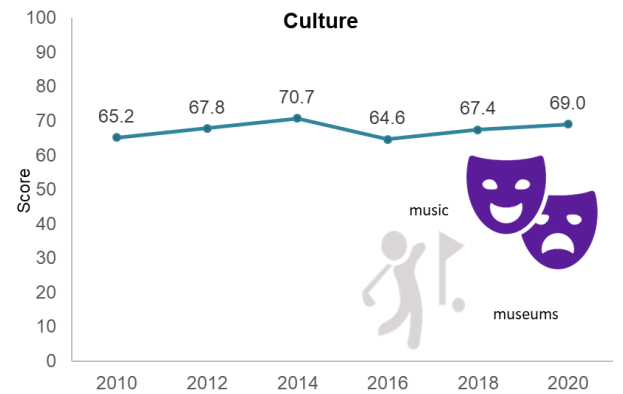
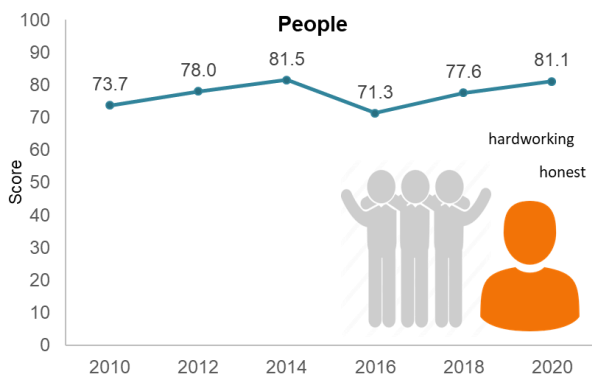
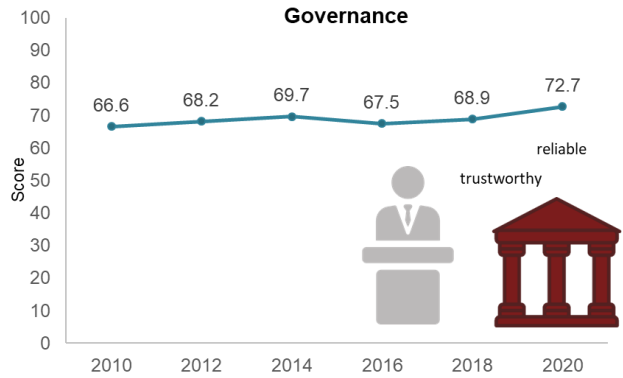
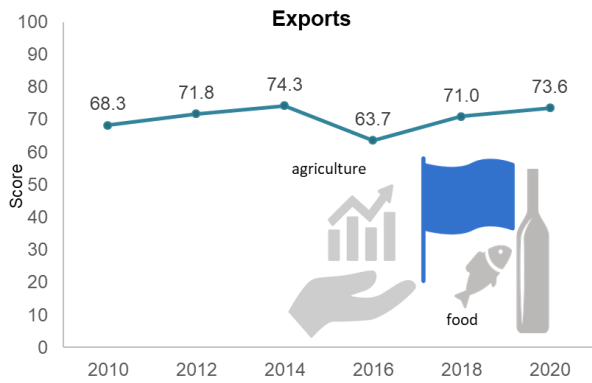


Figure 14 illustrates the score for how Scotland viewed itself across the six dimensions of reputation between 2010 and 2020. The score for how Scotland viewed itself increased each year between 2010 and 2014 across all six dimensions. This was followed by a decrease in scores across all six dimensions between 2014 and 2016 by an average of eight points. However, the scores have increased between 2016 and 2020 across all six dimensions. The dimension which experienced the greatest increase between 2018 and 2020 was Immigration and Investment, rising by five points.

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

**Figure 14: NBI<sup>SM</sup> How Scotland sees itself according to the six dimensions of reputation by score (2010-2020)**



In terms of rank, Scotland consistently ranked itself 1<sup>st</sup> overall between 2010 and 2014. In 2016, Scotland did not rank itself 1<sup>st</sup> overall or on any of the six dimensions. In addition, each dimension fell by an average of three places. However, in 2018 and 2020, Scotland once again ranked itself 1<sup>st</sup> overall. For individual dimensions Scotland ranked itself 1<sup>st</sup> for all dimensions in 2020 apart from Culture where it ranked itself 3<sup>rd</sup> (up one rank from 2018). See Table 10.

**Table 10: NBI<sup>SM</sup> How Scotland sees itself according to the six dimensions of reputation by rank (2010-2020)**

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

Tables 11 and 12 (see next two pages) show the score and rank for dimensions disaggregated by their underlying attributes. In 2020, Scotland's view of itself, in terms of score, was higher than 2018 on 22 of the 23 attributes within the dimensions<sup>44</sup>. The attribute which increased the most during this period was Willingness to live and work, which increased from 5.8 in 2018 to 6.3 in 2020. One attribute maintained over this period (Excellence at sports). See Table 11.

In terms of rank, Scotland's view of itself in 2020 was higher than in 2018 across 12 of the 23 attributes. The attribute whose rank increased the most during this period was Quality of life, which increased from 9<sup>th</sup> to 2<sup>nd</sup>. Ten attributes stayed the same across this period and one of the attributes, Excellence at sports, declined by two ranks. See Table 12.

In terms of favourability, Scotland consistently ranked itself 1<sup>st</sup> between 2010 and 2014. However, in 2016, Scotland ranked itself 3<sup>rd</sup> overall behind the United Kingdom (1<sup>st</sup>) and Canada (2<sup>nd</sup>). In 2018 and 2020, Scotland ranked itself 1<sup>st</sup> again on how favourable respondents were towards Scotland. In 2020, Scotland gave itself a score of 6.4 for favourability, up from 5.9 in 2018 (on a 1.0 to 7.0 scale). See Table 13.

<sup>44</sup> Note that the figures in Table 11 have been rounded.

**Table 11: NBI<sup>SM</sup> How Scotland sees itself disaggregated by the 23 attributes by score (2010 – 2020)**

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

**Table 12: NBI<sup>SM</sup> How Scotland sees itself disaggregated by the 23 attributes by rank (2010 – 2020)**

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



**Table 13: NBI<sup>SM</sup> How Scotland sees itself by Favourability (2018 – 2020)**

	Favourability	
	Rank	Score
2018	1	5.9
2020	1	6.4

# Conclusion

Scotland's score of 62.6 and rank of 17<sup>th</sup> on the NBI<sup>SM</sup> show that Scotland continues to have a strong reputation abroad. Countries that did better than Scotland and ranked in the Top 10 were Germany, United Kingdom, Canada, Japan, France, Italy, Switzerland, Sweden, Australia, and the United States.

In terms of absolute score, Scotland has remained stable from 2018 (62.7) to 2020 (62.6), with an overall change of 0.1. Scotland's relative rank has decreased overall from 2018, falling one place from 16<sup>th</sup> to 17<sup>th</sup>.

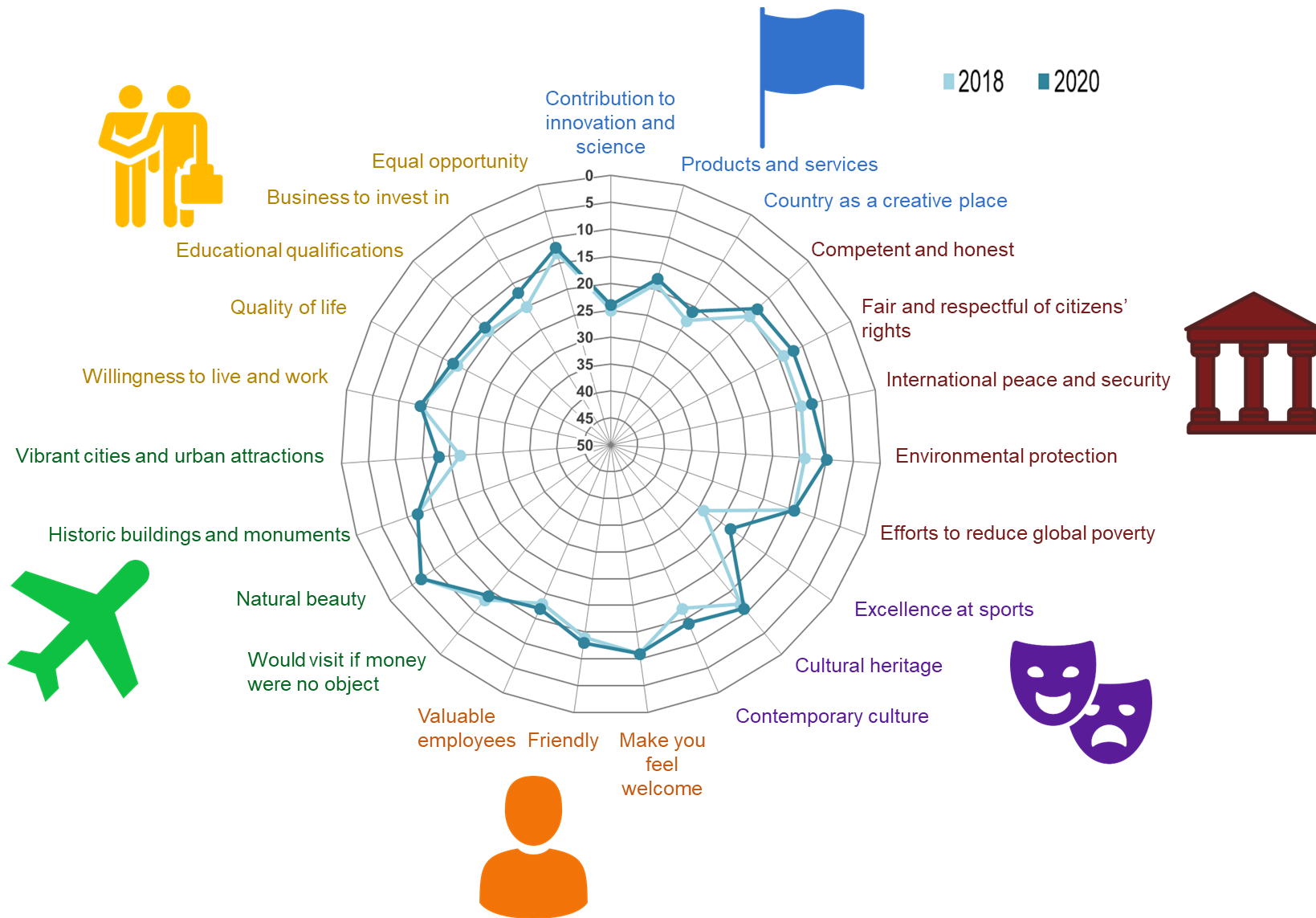
As outlined in the methodology, across the six NBI<sup>SM</sup> dimensions respondents were asked a total of 23 questions. Using the concept of the NBI<sup>SM</sup> hexagon, these attributes are visually summarised in Figure 15, where the centre of the circle represents the position of rank 50 (least reputable), and the outer circle represents the first (most reputable) position.

When all six NBI<sup>SM</sup> dimensions of Scotland's reputation are considered Tourism and Governance continue to be the dimensions most recognised by the respondents from around the world. Out of the six dimensions, Scotland's score for Culture shows the only improvement from 2018.

For the most part, respondents from across the world are able to distinguish between the different aspects of reputation. Respondents from certain countries are more familiar with Scotland and therefore better able to judge its strengths. English-speaking countries, European neighbours, Commonwealth countries, and the UK in particular, are the most favourable and familiar in terms of Scotland's reputation.

While Scotland's score has decreased between 2018 and 2020, the change of 0.1 is below the 1.0 point threshold for the National Indicator 'Scotland's reputation' indicating that Scotland's reputation is 'maintaining' internationally.

Figure 15: NBI<sup>SM</sup> Scotland's reputation across the 23 attributes by rank (2018 and 2020)



## Annex A: NBI<sup>SM</sup> Scotland's dimensions and attributes by demographic group<sup>4546</sup>

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: NBI<sup>SM</sup> Familiarity with Scotland by gender, age, occupation and tourism (2020)**

	Familiarity	
	Rank	Score <sup>47</sup>
<b>Gender</b>		
Male	21	69
Female	21	64
<b>Age</b>		
18-29	26	65
30-44	24	67
45 +	16	67
<b>Occupation</b>		
Business/Executives	19	78
Other	21	62
<b>Visited Scotland</b>		
Yes	20	71
No	26	49
<b>Visited a Scottish Website</b>		
Yes	21	72
No	22	57

<sup>45</sup> All rankings presented in the report are out of 50.

<sup>46</sup> 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).

<sup>47</sup> Familiarity score is presented as the percentage of respondents who had at least some knowledge of Scotland.

**Table 15: NBI<sup>SM</sup> Favourability towards Scotland by gender, age, occupation and tourism (2020)**

	Favourability	
	Rank	Score <sup>48</sup>
<b>Gender</b>		
Male	14	4.9
Female	14	5.0
<b>Age</b>		
18-29	16	4.7
30-44	14	5.0
45 +	11	5.1
<b>Occupation</b>		
Business/Executives	14	5.2
Occupation Other	14	4.9
<b>Visited Scotland</b>		
Yes	14	5.0
No	14	4.6
<b>Visited a Scottish Website</b>		
Yes	14	5.0
No	13	4.8

<sup>48</sup> Favorability scores are given on a scale from 1.0 (extremely unfavourable) to 7.0 (extremely favourable) with 4.0 being neither favourable nor unfavourable

**Table 16: NBI<sup>SM</sup> Scotland's reputation score for Exports by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Exports Overall</b>	<b>56.7</b>	<b>57.2</b>	<b>55.9</b>	<b>57.9</b>	<b>56.9</b>	<b>60.1</b>	<b>55.5</b>	<b>57.8</b>	<b>53.6</b>	<b>58.6</b>	<b>53.8</b>
Contribution to innovation and science	4.2	4.3	4.2	4.3	4.2	4.4	4.2	4.3	4.1	4.3	4.1
Products and Services	4.5	4.5	4.4	4.6	4.5	4.7	4.4	4.6	4.2	4.6	4.3
Country as a creative place	4.4	4.5	4.4	4.5	4.4	4.6	4.4	4.5	4.3	4.6	4.2

**Table 17: NBI<sup>SM</sup> Scotland's reputation rank for Exports by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Exports Overall</b>	<b>23</b>	<b>21</b>	<b>23</b>	<b>23</b>	<b>19</b>	<b>22</b>	<b>22</b>	<b>21</b>	<b>23</b>	<b>22</b>	<b>20</b>
Contribution to innovation and science	24	23	26	25	24	24	24	24	25	24	24
Products and Services	19	18	21	19	15	19	18	18	19	19	16
Country as a creative place	23	21	23	23	21	22	21	21	23	22	22

**Table 18: NBI<sup>SM</sup> Scotland's reputation score for Governance by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Governance Overall</b>	<b>63.3</b>	<b>62.5</b>	<b>59.5</b>	<b>62.7</b>	<b>65.6</b>	<b>66.7</b>	<b>61.3</b>	<b>64.0</b>	<b>58.7</b>	<b>64.6</b>	<b>59.8</b>
Competent and honest	4.8	4.7	4.6	4.7	4.9	5.0	4.7	4.8	4.5	4.9	4.6
Fair and respectful of citizens' rights	5.0	4.9	4.7	4.9	5.2	5.2	4.9	5.1	4.7	5.1	4.8
International peace and security	4.9	4.8	4.6	4.8	5.1	5.1	4.8	4.9	4.5	4.9	4.7
Environmental protection	4.8	4.7	4.6	4.8	4.9	5.0	4.7	4.8	4.6	4.9	4.5
Efforts to reduce global poverty	4.4	4.4	4.3	4.5	4.5	4.7	4.3	4.5	4.2	4.5	4.3

**Table 19: NBI<sup>SM</sup> Scotland's reputation rank for Governance by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Governance Overall</b>	<b>13</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>10</b>	<b>13</b>	<b>12</b>	<b>12</b>	<b>16</b>	<b>13</b>	<b>13</b>
Competent and honest	13	12	14	15	10	12	13	11	16	13	14
Fair and respectful of citizens' rights	13	12	16	15	10	12	12	11	16	12	13
International peace and security	13	12	15	17	12	14	12	12	17	13	13
Environmental protection	10	11	12	10	11	10	10	10	13	10	13
Efforts to reduce global poverty	14	13	16	16	12	13	14	13	17	14	13

**Table 20: NBI<sup>SM</sup> Scotland's reputation score for Culture by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Culture Overall</b>	<b>60.1</b>	<b>61.4</b>	<b>58.7</b>	<b>61.4</b>	<b>61.7</b>	<b>63.7</b>	<b>59.5</b>	<b>61.3</b>	<b>58.4</b>	<b>62.4</b>	<b>57.6</b>
Excellence at sports	4.2	4.3	4.1	4.3	4.3	4.4	4.2	4.3	4.2	4.3	4.1
Cultural heritage	5.0	5.1	4.9	5.1	5.2	5.3	5.0	5.1	4.8	5.2	4.9
Contemporary culture	4.5	4.6	4.5	4.6	4.6	4.7	4.5	4.6	4.4	4.7	4.4

**Table 21: NBI<sup>SM</sup> Scotland's reputation rank for Culture by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Culture Overall</b>	<b>16</b>	<b>15</b>	<b>23</b>	<b>17</b>	<b>14</b>	<b>17</b>	<b>16</b>	<b>16</b>	<b>19</b>	<b>16</b>	<b>17</b>
Excellence at sports	23	24	28	23	23	24	23	24	25	23	25
Cultural heritage	12	11	14	12	11	12	11	11	12	12	11
Contemporary culture	15	13	21	14	12	16	12	14	17	14	13



**Table 22: NBI<sup>SM</sup> Scotland's reputation score for People by gender, age, occupation and tourism (2020)**

Demographic group → Attribute ↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>People Overall</b>	<b>65.0</b>	<b>66.7</b>	<b>63.6</b>	<b>65.9</b>	<b>67.4</b>	<b>69.4</b>	<b>64.3</b>	<b>66.9</b>	<b>61.7</b>	<b>67.8</b>	<b>62.2</b>
Make you feel welcome	4.8	4.9	4.6	4.9	5.1	5.1	4.8	4.9	4.6	5.0	4.7
Friendly	4.8	4.9	4.8	4.9	4.9	5.1	4.8	4.9	4.7	5.0	4.6
Valuable employees	5.0	5.1	4.9	5.0	5.1	5.2	5.0	5.1	4.7	5.2	4.8

**Table 23: NBI<sup>SM</sup> Scotland's reputation rank for People by gender, age, occupation and tourism (2020)**

Demographic group → Attribute ↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>People Overall</b>	<b>16</b>	<b>13</b>	<b>16</b>	<b>16</b>	<b>10</b>	<b>15</b>	<b>15</b>	<b>14</b>	<b>14</b>	<b>16</b>	<b>13</b>
Make you feel welcome	14	8	19	10	8	11	12	10	12	12	11
Friendly	15	11	15	13	9	13	14	12	15	14	12
Valuable employees	16	17	18	18	14	17	17	15	18	18	16

**Table 24: NBI<sup>SM</sup> Scotland's reputation for Tourism by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Tourism Overall</b>	<b>67.4</b>	<b>70.2</b>	<b>66.0</b>	<b>68.9</b>	<b>70.7</b>	<b>72.1</b>	<b>67.4</b>	<b>69.9</b>	<b>64.3</b>	<b>70.6</b>	<b>65.4</b>
Would visit if money were no object	5.2	5.3	5.1	5.2	5.3	5.5	5.1	5.3	4.9	5.4	5.0
Natural beauty	5.2	5.5	5.1	5.4	5.6	5.5	5.3	5.4	5.1	5.5	5.2
Historic buildings and monuments	5.0	5.1	4.8	5.1	5.2	5.2	5.0	5.1	4.8	5.1	4.9
Vibrant cities and urban attractions	4.8	4.9	4.8	4.8	4.8	5.0	4.7	4.8	4.6	4.9	4.6

**Table 25: NBI<sup>SM</sup> Scotland's reputation rank for Tourism by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Tourism Overall</b>	<b>12</b>	<b>12</b>	<b>18</b>	<b>13</b>	<b>9</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>
Would visit if money were no object	15	11	16	16	8	15	14	12	16	16	11
Natural beauty	9	7	11	9	7	7	8	7	8	7	7
Historic buildings and monuments	12	11	15	12	11	13	12	12	12	12	12
Vibrant cities and urban attractions	19	21	23	26	18	24	16	20	21	19	17

**Table 26: NBI<sup>SM</sup> Scotland's reputation score for Immigration and Investment by gender, age, occupation and tourism (2020)**

Demographic group→ Attribute↓	Gender		Age			Occupation		Visited Scotland		Visited a Scottish Website	
	Male	Female	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Immigration and Investment Overall</b>	<b>60.6</b>	<b>60.3</b>	<b>59.7</b>	<b>61.2</b>	<b>60.5</b>	<b>64.7</b>	<b>58.7</b>	<b>61.4</b>	<b>56.8</b>	<b>63.1</b>	<b>55.7</b>
Willingness to live and work	4.4	4.4	4.5	4.5	4.3	4.7	4.3	4.5	4.2	4.6	4.0
Quality of life	4.9	5.0	4.8	5.0	5.0	5.2	4.9	5.0	4.8	5.1	4.8
Educational qualifications	4.7	4.7	4.6	4.7	4.7	4.9	4.6	4.7	4.5	4.8	4.4
Business to invest in	4.3	4.2	4.3	4.4	4.1	4.5	4.1	4.3	4.1	4.5	3.9
Equal opportunity	4.8	4.7	4.6	4.7	4.9	5.0	4.6	4.8	4.5	4.8	4.5

**Table 27: NBI<sup>SM</sup> Scotland's reputation score for Immigration and Investment by gender, age, occupation and tourism (2020)**

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

## Further information

Further information and copies in alternative formats can be obtained by contacting:

### **Eva Kleinert**

Constitution and External Affairs Analysis  
Scottish Government  
St Andrew's House  
Edinburgh  
EH1 3DG  
Email: [eva.kleinert@gov.scot](mailto:eva.kleinert@gov.scot)

### **Hannah Rutherford**

Constitution and External Affairs Analysis  
Scottish Government  
St Andrews House  
Edinburgh  
EH1 3DG  
Email: [hannah.rutherford@gov.scot](mailto:hannah.rutherford@gov.scot)

### **Minna Liinpää**

Constitution and External Affairs Analysis  
Scottish Government  
St Andrews House  
Edinburgh  
EH1 3DG  
Email: [minna.liinpaa@gov.scot](mailto:minna.liinpaa@gov.scot)



Scottish Government  
Riaghaltas na h-Alba  
gov.scot

© Crown copyright 2021

**OGL**

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit [nationalarchives.gov.uk/doc/open-government-licence/version/3](https://nationalarchives.gov.uk/doc/open-government-licence/version/3) or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk).

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

This publication is available at [www.gov.scot](http://www.gov.scot)

Any enquiries regarding this publication should be sent to us at

The Scottish Government  
St Andrew's House  
Edinburgh  
EH1 3DG

ISBN: 978-1-80004-677-1 (web only)

Published by The Scottish Government, February 2021

Produced for The Scottish Government by APS Group Scotland, 21 Tennant Street, Edinburgh EH6 5NA  
PPDAS807946 (02/21)

W W W . g o v . s c o t