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The Anholt-GfK Roper Nation Brands IndexSM: 2016 Report for Scotland



PUBLIC SERVICES AND GOVERNMENT



THE ANHOLT – GfK ROPER

NATION BRANDS INDEXSM:

2016 REPORT FOR SCOTLAND

Scottish Government Strategic Analysis

The views expressed in this report are those of the researchers and do not necessarily represent those of the Scottish Government or Scottish Ministers

Scottish Government Social Research

2017

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1. Executive summary

1.1 To **'Improve Scotland's Reputation'** is one of 55 indicators in the Scottish Government's National Performance Framework.¹ National Indicators enable the Scottish Government to track progress towards the achievement of National Outcomes and the overall Purpose, to create a more successful country, with opportunities for all of Scotland to flourish.² Since 2008, the Scottish Government has used the Anholt-GfK Roper Nation Brands IndexSM (NBISM)³ to assess and monitor how Scotland's reputation is perceived around the world.

1.2 The NBISM examines the image of 50 countries by looking at a country's reputation along **six dimensions of national competence**: Exports, Governance, Culture, People, Tourism, and Investment and Immigration. These together provide an overall indication of a country's reputation.

1.3 The data provide snapshots in time. Over a number of years, they can track Scotland's reputation in the long-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 the performance of specific Scottish Government directorates, agencies or policies.

1.4 Scotland's **overall** 2016 score of 62.2 per cent and rank of 15th on the NBISM show that Scotland continues to have a strong reputation abroad. The score and rank place Scotland alongside and sometimes ahead of other comparator small, high income Western countries. Scotland's relative rank has improved by two places since 2014. In terms of absolute score, Scotland's reputation has improved from 61.8 per cent in 2014, an overall change of 0.4 percentage points. This is the highest score Scotland has received since the baseline study of 2008.

1.5 Scotland has a strong and balanced image, rated in the Top 20 on five of its six dimensions. Between 2014 and 2016, Scotland's reputation improved the most in China, India, Mexico and the United Kingdom. Perceptions of Scotland are generally highest amongst Commonwealth and English speaking countries.

1.6 Scotland's strongest dimensions in 2016 were Governance and Tourism, both of which ranked Scotland 12th in the world. Scotland's weakest dimensions were Immigration-Investment (17th) and Exports (21st).

1.7 Scotland is viewed as a world leader (ranked in the Top 10) for its efforts in International Peace and Security as well as its efforts towards environmental

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

² <http://www.gov.scot/About/Performance/scotPerforms/outcome>

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protection. It ranked 12th in relation to its fair treatment of its citizens, and its reputation of having an honest and competent government.

1.8 Scotland's reputation with the United Kingdom improved in 2016. In 2014 the United Kingdom ranked Scotland 6th in the world, while in 2016 the United Kingdom ranked Scotland 3rd. The United Kingdom also ranked Scotland equally or higher on four of the six dimensions (Governance, Culture, People and Tourism) than Scotland ranked itself.

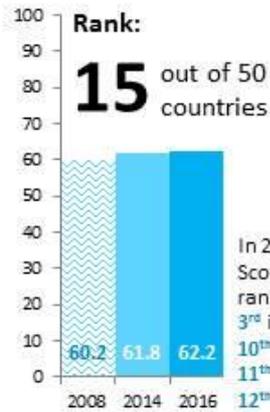
1.9 At the start of the NBISM survey, participants are asked to rate how well they know and how favourable they are towards each country. Familiarity with Scotland has declined from 2014, most noticeably in developed countries (Australia, Germany, Canada, the United States). Favourability towards Scotland rose slightly overall between 2014 and 2016. However, favourability in how Scotland perceived itself dropped from 6.4 (on a 7 point scale) in 2014 to 5.5 in 2016. Notably, favourability towards Scotland rose in the United Kingdom from 5.3 in 2014 to 5.5 in 2016, indicating the same level of favourability towards Scotland as Scotland expressed towards itself.

1.10 In the 2010, 2012, 2014 and 2016 NBISM studies, Scotland was included as a core panel country and a rated country, and thus Scotland rated itself in each of these years. Scotland scored and ranked itself lower in 2016 than it did in previous years. In 2014, Scotland ranked itself 1st and gave itself a score of 75.7 per cent, while in 2016 Scotland ranked itself 3rd behind Canada and the United Kingdom and gave itself a score of 67.8 per cent.

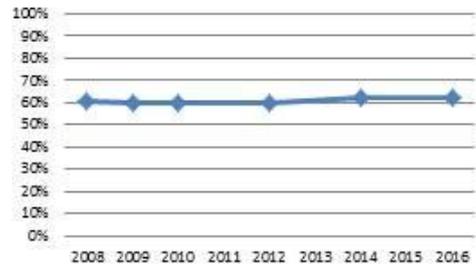
1.11 Overall, older individuals tended to have a more positive image of Scotland than younger individuals, with those 45 years and older having the most positive image of Scotland across all six dimensions. The more exposure people had had to Scotland (through visits or contact with websites) the more 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.

1.12 While Scotland's score has increased between 2014 and 2016, the change of 0.4 is below the 1.0 percentage point threshold for Scotland's National Indicator 5, indicating that Scotland's reputation is 'maintaining' internationally.

Scotland's Reputation 2016



National Indicator: improve Scotland's reputation



This indicator is based on Scotland's score on Anholt-GfK Roper Nation Brands Index

<p>12th out of 50 countries</p> <p>GOVERNANCE</p> <p>reliable trustworthy</p>	<p>12th out of 50 countries</p> <p>TOURISM</p> <p>relaxing exciting fascinating</p>
<p>17th out of 50 countries</p> <p>IMMIGRATION AND INVESTMENT</p> <p>modern forward thinking</p>	<p>14th out of 50 countries</p> <p>PEOPLE</p> <p>hardworking honest</p>
<p>21st out of 50 countries</p> <p>EXPORTS</p> <p>agriculture food</p>	<p>16th out of 50 countries</p> <p>CULTURE</p> <p>sports music museums</p>

To 'Improve Scotland's Reputation' is one of the indicators of progression the Scottish Government's National Performance Framework. Since 2008, the Scottish Government has used the Anholt-GfK Roper Nation Brands Index 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 49 other countries included in the Nation Brands Index.



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2. Introduction

2.1 The Scottish Government's National Performance Framework (NPF) sets out in the Purpose and the National Outcomes, a clear, unified vision for Scotland. The Purpose is to focus government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth. A wide range of indicators (55) are used to assess progress towards this and the National Outcomes. These provide a broad measure of national wellbeing, incorporating a range of economic, social and environmental indicators and targets. One of these indicators aims to assess and monitor how Scotland's reputation is perceived around the world.

2.2 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.

2.3 Since 2008, the Scottish Government (SG) has used the Anholt-GfK Roper Nations Brands IndexSM to measure Scotland's reputation internationally. The NBISM is an analytical tool which attempts to measure and rank a country's broad reputation along six dimensions of national competence: Exports, Governance, Culture, People, Tourism, and Investment and Immigration. These together provide an overall indication of a country's reputation.

2.4 The data allow for an understanding of how Scotland is perceived in 20 panel countries around the world, how Scotland perceives itself, and how it compares to 49 other countries included in the NBISM.

2.5 While being the best available measure of Scotland's reputation for the purpose of the NPF, the NBISM does not provide an evaluation of the Scottish Government's policies.

2.6 NBISM data should be viewed as a snapshot of people's attitudes and perceptions of Scotland. Attitudinal data of this kind are, however, useful in helping us to understand more about Scotland's international reputation.

2.7 Scotland subscribed to the survey in 2008, 2009 and 2010, and thereafter biennially, in 2012, 2014 and 2016. Scotland did not subscribe to the 2011 and 2013 surveys, but was included in the sample of 50 evaluated countries in both of these years.

2.8 This report will compare the 2016 data to the most recent previously available data of 2014, as well as previous years where relevant.

3. Methodology

3.1 Conducted annually since 2008, the Anholt-GfK Roper Nation Brands IndexSM 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 Anholt-GfK Roper Nation Brands IndexSM explores a country's image by examining six dimensions of national competence, all of which are weighted equally. The six dimensions are: Exports, Governance, Culture, People, Tourism, Immigration and Investment.

3.2 The NBISM score is an average of the scores from these six dimensions, given as a value out of 100. There are between 3 and 5 questions for each of these dimensions, resulting in a total of 23 'attributes' across the six dimensions. Ratings are based on a scale from 1 to 7, with 7 being the highest (best), 1 being the lowest (worst), and 4 being the middle position (neutral). Each dimension also has a word choice question which gives some depth to how those surveyed perceive a country's image.

3.3 Given the increasing global role played by developing countries, the survey strived to represent regional balance as well as balance between high-income and middle-income countries. The list of **50 rated countries** in 2016 is as follows, listed by region:⁴

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

⁴ * Indicates countries that were included in the 2016 but not in the 2014 survey. Countries included in 2014 but not 2016 include Puerto Rico, Norway, Ukraine and Jamaica.

3.4 The 2016 NBISM survey was conducted in 20 major developed and developing countries. Scotland was included as a 21st panel country in 2016 to enable an analysis of how Scotland views itself.

3.5 The **21 countries included in the 2016 core panel** were: the United States of America, Canada, United Kingdom, Germany, France, Italy, Sweden, Scotland, Russia, Poland, Turkey, Japan, China, India, South Korea, Australia, Argentina, Brazil, Mexico, Egypt and South Africa.

3.6 Data collection was achieved through online self-administered interviews. Consequently, the sample was not representative of the populations in individual countries. Interviews were conducted with a total of 20,353 adults (aged 18 and over). The sample size per country was a minimum of 1000. Interviews were carried out between 7 July and 25 July 2016.⁵

3.7 In each panel country the list of 50 countries was randomly assigned to respondents, each of whom rated 25 countries. This resulted in each country receiving approximately 500 ratings per panel country.⁶ Thus approximately half of the total sample was asked to rate and compare Scotland's reputation.

Interpreting the 2016 NBISM data

3.8 In the long term, the NBISM represents a useful tool to track and monitor Scotland's reputation internationally. However, it does not provide an evaluative measure of policy interventions.

3.9 The contractors, GfK Roper and Simon Anholt, own the concept, data and intellectual rights. The Scottish Government is therefore restricted in what it can publish from the Nation Brands IndexSM. The data published and analysed in this report represent the core information on Scotland's position on the NBISM. The report has been checked by the contractors to ensure it complies with the Scottish Government's contractual obligations.

3.10 The NBISM provides both a rank and score of the overall and individual elements of a country's reputation. It is important to note that the rank is responsive to changes in the sample of evaluated countries and is therefore informative about the relative rankings in a particular year only. The score enables direct comparison between years.

⁵ Using online population parameters, the achieved sample in each country was weighted to reflect key demographic characteristics such as age, gender and education. Additionally, in the United States, the United Kingdom, South Africa, India and Brazil, race/ethnicity was used for sample balancing (i.e. adjust the data to account for sample bias).

⁶ The GfK introduced two exceptions to this rule. In Egypt, where panellists are not as familiar and experienced with online surveys, survey length was reduced, resulting in each country receiving approximately 250 ratings. Chinese panellists were asked to rate all countries except their own.

3.11 GfK supplied the Scottish Government with a methodology report, and three datasets:

- **The 2016 Data Dashboard.** This included data for the six dimensions, the attributes that comprise the dimensions, and other fundamental brand metrics covered in the NBISM (for example: familiarity and favourability). The data dashboard was structured into the ratings and rankings for all 50 countries for all questions asked of the 21 panel countries and data for Scotland as a 21st panel country.
- **The Demographic Dashboard.** This comprised data for the ratings and rankings from the 21 panel countries combined (on a global level), disaggregated by some basic demographic variables: three age groups (18-29; 30-44; 45+); two categories of occupation (business/executives and other occupations); whether respondents have visited Scotland for either business or vacation (Yes or No), and whether respondents have visited a Scottish Website (Yes or No).
- **Word association tables.** For each of the six dimensions, respondents were presented with a list of words that might best describe a country in terms of that dimension. Each question had between eight to ten words to select from. For the Exports, Culture, People and Tourism dimensions, multiple words were permitted. For the Governance and Immigration and Investment dimensions, only one word was permitted.

3.12 The NBISM is used to assess progress against one of the indicators from the Scottish Government's National Performance Framework, ***'Improve Scotland's Reputation'***. Assessment of any change in Scotland's performance is based on Scotland's absolute score as it compares to the previous year's score. An increase of 1 point or more in Scotland's absolute score suggests that the position is "improving", whereas a decrease of 1 point or more in Scotland's absolute score suggests that the position is "worsening". This report will comply with these guidelines and will only consider an increase/decrease in score exceeding 1 point to be representing change, and otherwise treat the score as unchanged.

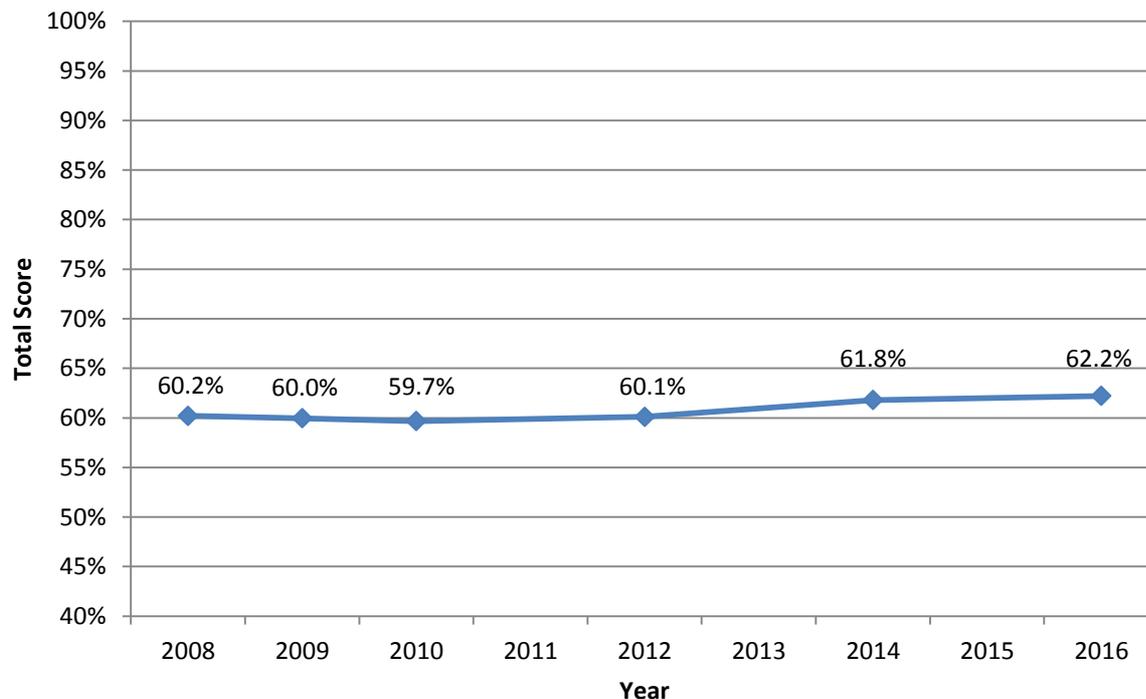
4. Scotland's reputation overall

Scotland's position on the NBISM

4.1 Scotland's 2016 score of 62.2⁷ and rank of 15th place Scotland in the Top 20 countries and indicate that Scotland has a high level of international recognition. Scotland's overall reputation in terms of the NBISM score increased in comparison to its 2012 and 2014 scores (60.1 and 61.8 respectively). Scotland's relative 2016 rank (15th) has also increased from its 2014 level of 17th.

4.2 Scotland's overall reputation scores and ranks alongside, and ahead of some other comparator small, high income, liberal Western European democracies. Countries which ranked higher than Scotland tended to be developed European and North American countries. Figure 4.1 shows that, while Scotland maintained its reputation between 2008 (when Scotland joined) and 2012, its reputation has improved between 2012 and 2014, and between 2014 and 2016.

Figure 4.1: NBISM How the world sees Scotland 2008-2016



4.3 Scotland's score of 62.2 per cent places Scotland in the 7th decile, far closer to the country with the top score (69 per cent) than the bottom (41.6 per cent). Countries that did better than Scotland were invariably high income countries, and tended to have larger populations than Scotland.

4.4 People in older age groups tended to score Scotland higher than those in younger age groups. People between 18 and 44 years scored Scotland's reputation, on average, 61.1 per cent (rank 16th), while those aged 45 years or older scored Scotland on average 64 per cent (rank 12th).

⁷ Figures have been rounded off to one decimal place.

4.5 Those who had visited Scotland scored Scotland the highest out of all demographic categories, with a score of 69.8 per cent and a rank of 12th. People whose occupation was business/executives also tended to give Scotland a higher score (64.5 per cent) than those in other occupations (61.4 per cent), but business/executives tended to give all countries a higher score overall (on average 3 points higher), and relative to other countries ranked Scotland lower (15th) than those in other occupations (14th).

National Performance Framework indicator: ‘Improve Scotland’s Reputation’

4.6 The NBISM is used to assess progress for National Indicator 5 (‘Improve Scotland’s Reputation’).

4.7 Scotland’s absolute NBISM score has increased between 2014 to 2016 by 0.4 per cent. This is the highest score Scotland has received since the baseline study of 2008. As the change in Scotland’s score between 2014 and 2016 is below the 1 percentage point threshold, the Scotland Performs Technical Assessment Group has approved that the arrow for National Indicator 5 will change from ‘Performance Improving’ to ‘Performance Maintaining’ internationally.

Scotland’s reputation in different countries

4.8 Table 4.1 shows Scotland’s 2016 rank and score by each of the panel countries, and how this compares with 2014, with 2014 rank and scores given in brackets. Looking at the scores and ranks together is useful, as they may deliver different messages about Scotland’s reputation. The **rank** is responsive to changes in the sample of evaluated countries and is informative of a country’s reputation relative to other countries. However, the **score** may be regarded as a more reliable indicator of a country’s reputation over time. Scotland’s score was higher in 11 countries in 2016 than it had been in 2014, with the biggest change in the score awarded by India. Scotland was ranked higher in 10 countries in 2016 than it was in 2014, most notably by China, India, Mexico and the United Kingdom.⁸ The only countries that the United Kingdom ranked more positively than Scotland were the United States and itself.

4.9 Scotland’s rank remained stable in Egypt and South Africa in 2016, but was rated lower by 8 countries, including Canada and France.

4.10 In several countries (South Korea, Argentina, Germany) Scotland’s rank was lower in 2016 compared to 2014, and its reputational score was higher. In Sweden the score was lower in 2016 but the rank was higher.

4.11 Scotland’s perception of itself was lower in 2016 (when it ranked itself third behind Canada and the UK) than in 2014 (when it ranked itself first).

⁸ Some of the UK sample asked about Scotland were either living in Scotland and/or were from Scotland.

4.12 Perceptions of Scotland were generally more positive amongst Commonwealth and English speaking countries.

Table 4.1: NBISM Scotland's rank and score by 21 panel countries in 2016 (and 2014)

Panel countries	Scotland's rank	Scotland's score
Scotland	3 (1)	67.8 (75.7)
United Kingdom	3 (6)	67.8 (65.7)
United States	10 (12)	62.3 (62.7)
Australia	11 (10)	63.7 (64.5)
India	12 (19)	70.3 (66)
South Africa	12 (12)	64.8 (65.7)
Sweden	13 (15)	62.3 (62.6)
Canada	14 (10)	64 (65.6)
Germany	15 (14)	63.6 (62.3)
Brazil	16 (17)	64.8 (62.1)
Mexico	16 (21)	64.4 (63.5)
Italy	16 (17)	60.8 (61)
France	16 (12)	59.7 (61.2)
Russia	17 (16)	62.4 (64.8)
China	18 (23)	63 (61.3)
Poland	18 (19)	61.5 (61.4)
Japan	19 (18)	53.6 (53.9)
South Korea	21 (20)	57.6 (56.9)
Turkey	21 (22)	57 (54.8)
Argentina	24 (23)	58.6 (58.5)
Egypt	26 (26)	62.4 (61.8)
Average	15 (17)	62.2 (61.8)

4.13 Table 4.2 shows how people in different demographic groups score and rank Scotland. Scores are provided first, followed by rank. Notably, those who have had some exposure to Scotland, whether having visited Scotland for work or holiday, or visited a Scottish website, scored Scotland higher than those with little or no exposure to Scotland.

4.14 In relation to occupation, the data only allow disaggregation between business/executives and 'other'. Those in the former group tended to view Scotland more positively in terms of score than those in other occupations. However, across the NBI dataset, business/executives tended to view all countries more positively than those in other occupations.

Table 4.2: NBISM How the world sees Scotland by occupation and tourism 2016

		Score	Rank
Occupation	Business/Executives	64.5	15
	Other	61.4	14
Visit for vacation	Yes	69.8	12
	No	61.0	15
Website visits	Yes	69.7	14
	No	60.6	14

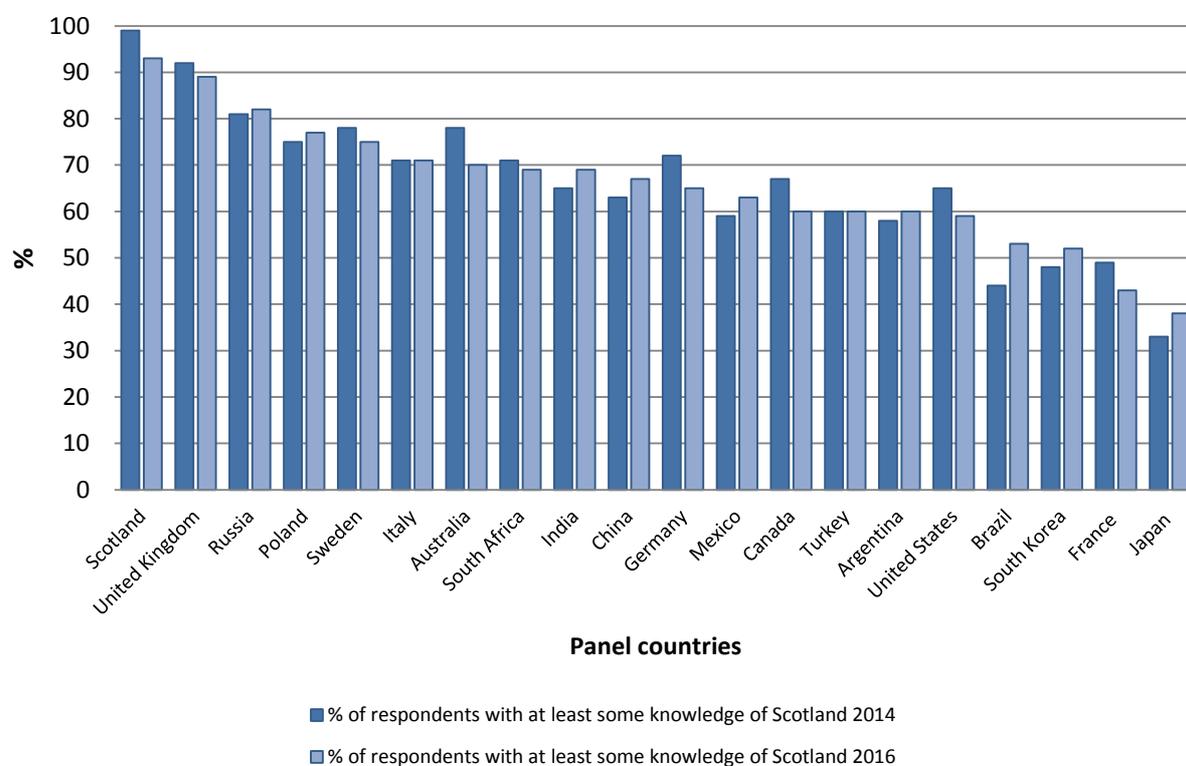
Familiarity with and favourability towards Scotland

4.15 At the start of the NBISM survey, participants are asked to rate how well they know and how favourable they are towards each country. The responses provide data for favourability and familiarity towards Scotland. Figure 4.3 shows levels of **familiarity** with Scotland across panel countries in 2014 and 2016.

4.16 **Familiarity:** European countries tended to be the most familiar with Scotland, with 89 per cent of the United Kingdom, 82 per cent of the Russian and 77 per cent of Polish respondents having at least some knowledge of Scotland. There was one notable exception among European countries, however. France was the second least familiar with Scotland, dropping from 49 per cent in 2014 to 43 per cent in 2016. Central/Eastern European countries showed the greatest familiarity with Scotland, with an average familiarity of 73 per cent, followed by Western European countries (68.6 per cent) and Asia-Pacific countries (64.5 per cent).

4.17 In 2016, the NBISM panel countries were on average slightly less familiar with Scotland than the 2014 sample (average familiarity score of 63 per cent in 2016 compared to 65 per cent in 2014). Asia-Pacific countries and Latin American countries showed the greatest increase of familiarity with Scotland between 2014 and 2016, while European and North American countries showed the greatest decrease in familiarity with Scotland.

Figure 4.3: NBISM levels of familiarity with Scotland 2014 and 2016

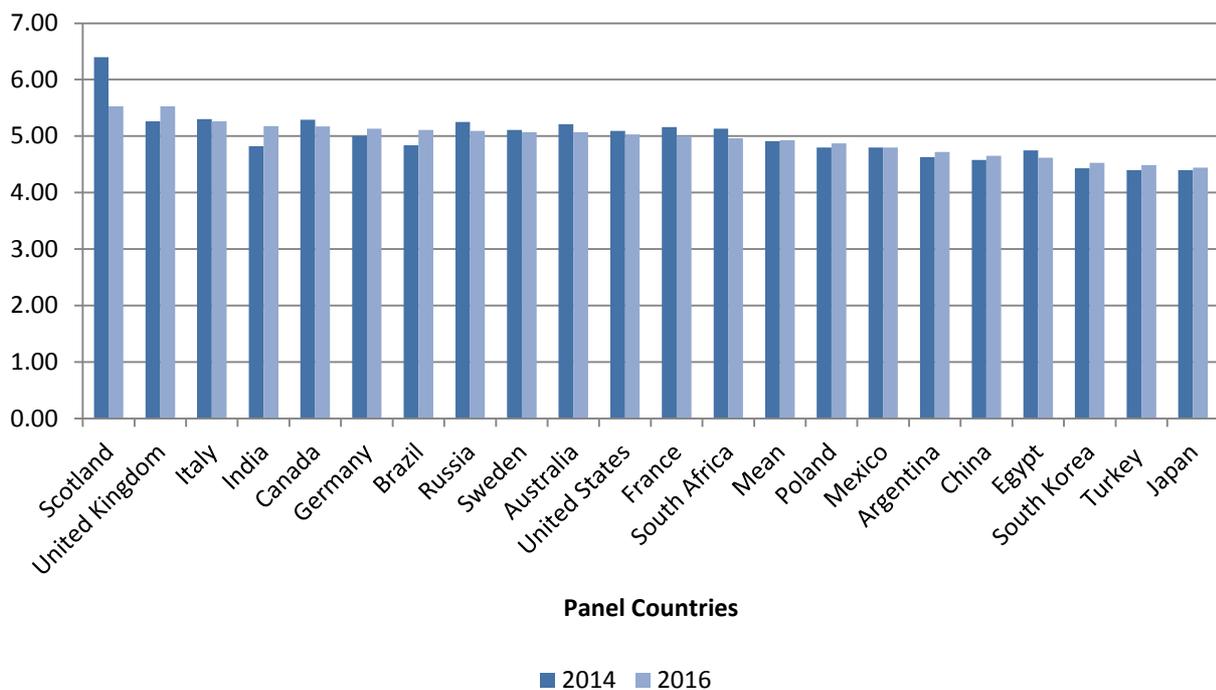


4.18 **Favourability:** Figure 4.4 indicates panel countries' levels of favourability towards Scotland. The greatest improvement in favourability towards Scotland was in India (4.8 to 5.2 on a 7 point scale), the UK (5.3 to 5.5) and Brazil (4.8 to 5.1),

while the greatest decline was in how Scotland viewed itself. This fell from 6.4 in 2014 to 5.5 in 2016.

4.19 Western European countries were the most favourable towards Scotland, with an average favourability of 5.2 on a 7 point scale, followed by North American countries (5.1). Asia/Pacific countries were the least favourable towards Scotland (4.8).

Figure 4.4: NBISM levels of favourability towards Scotland 2014 and 2016



4.20 Table 4.3 shows summary findings on familiarity and favourability by demographic groups All age groups were equally familiar with Scotland, though those in older age groups tended to be slightly more favourable towards Scotland. In addition, those who were more familiar with Scotland tended to be more favourable towards Scotland.

Table 4.3: Familiarity with and favourability towards Scotland (demographic breakdown) 2016

	Familiarity	Favourability
Occupation		
Business Executives	3.2 (21)	5.1 (15)
Occupation Other	2.9 (22)	4.9 (13)
Tourism		
Visited Scotland	3.9 (19)	5.7 (7)
Not Visited Scotland	2.8 (19)	4.8 (11)
Has visited Website	3.4 (25)	5.3 (13)
Has not Visited Website	2.9 (21)	4.9 (13)
Age		
18-29	3 (28)	4.8 (14)
30-44	3 (25)	4.9 (14)
45 +	3 (15)	5.1 (11)

5. Scotland's six dimensions of reputation

Introduction

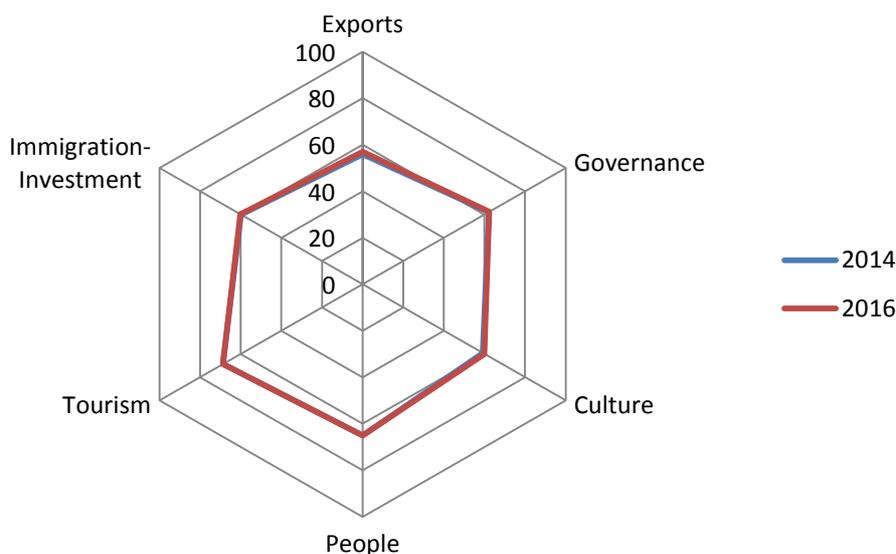
5.1 The Anholt-GfK Roper Nation Brands IndexSM explores a country's image by examining six dimensions of national competence, all of which are weighted equally and together make up the NBISM score. These dimensions comprise:

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

5.2 Figure 5.1 displays Scotland's 2014 and 2016 performance across the six primary dimensions, with each vertex representing one of the six dimensions. As can be seen, there is little to no difference in terms of score on each dimension between 2014 and 2016.

5.3 Overall, Scotland has a strong and fairly balanced image, rated as a Top 20 country on five of the six dimensions of reputation, which is comparable to the 2014 results. Countries with a similar image profile to Scotland include Austria, New Zealand and Denmark.

Figure 5.1: NBISM Scotland's performance across the six dimensions of reputation (score) 2014 - 2016



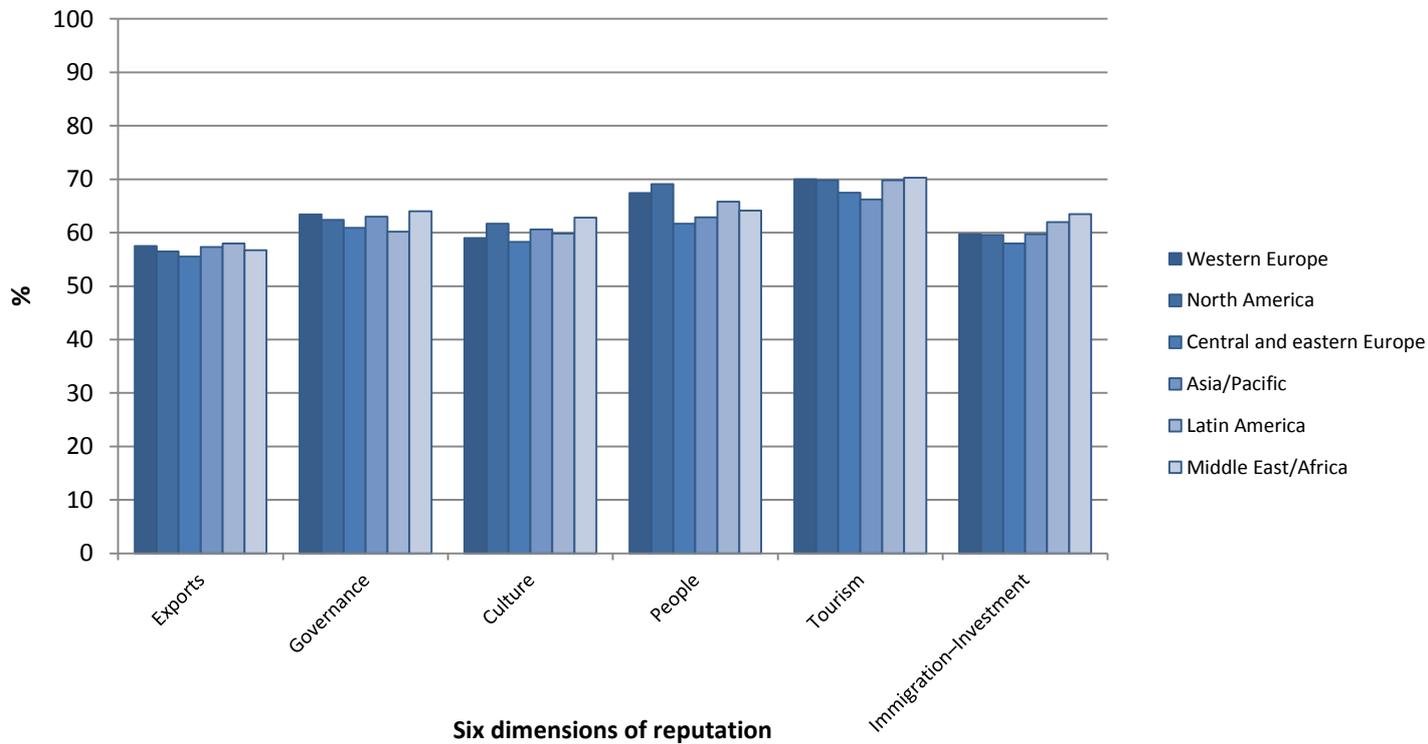
5.4 In terms of rank, there have been a number of changes, which must be understood as relative to the sampled countries rather than absolute changes in how Scotland is perceived. Scotland's rank was higher in 2016 than 2014 on four of the six dimensions (Exports, Governance, People and Culture), while maintaining on the other two dimensions (Tourism and Immigration-Investment). Scotland's most positive dimensions in 2016 were Governance and Tourism, both of which placed 12th out of the 50 countries, while Scotland's least positive dimensions were Immigration and Investment (17th), which was stable from 2014, and Exports (21st) which was one place lower than in 2014.

5.5 As Figure 5.2 illustrates, there was little to no difference in average scores given by the different geographic regions of the world. The Middle East/Africa scored Scotland highest overall (63.6 per cent), followed by North America (63.2 per cent). The region which scored Scotland the lowest was Central and Eastern Europe (60.4 per cent).

5.6 There was no difference between how panel EU⁹ and panel non-EU countries scored Scotland overall and for each dimension. The UK scored Scotland higher than Scotland scored itself on four of six dimensions (Governance, Culture, People and Tourism), while Scotland scored itself the highest for Exports (63.7 per cent) and Immigration and Investment (66.6 per cent).

⁹EU countries include: France, Germany, Italy, Poland and Sweden. Non-EU countries include Argentina, Australia, Brazil, Canada, China, Egypt, India, Japan, Mexico, Russia, South Africa, South Korea, Turkey and United States.

Figure 5.2: NBISM Scotland's six dimensions of reputation by geographic region 2016



5.7 Older individuals tended to have a more positive view of Scotland than younger individuals, with those 45 years and older having the most positive image of Scotland across all six dimensions. Those who had visited Scotland gave the highest scores, ranking Scotland 12th overall, in comparison to those who had not visited, ranking Scotland 15th.

5.8 The following section investigates each of the six dimensions, with three tables relating to each dimension. In each table, the rank and score is given for that dimension overall. Scores are presented as a score out of 100, calculated as an average of the scores given for the underlying attributes. However, for each of the attributes, the score is given as a value between zero and seven where zero is the lowest (worst) value possible, and seven the highest (best) value possible.

Exports

5.9 The Exports dimension aims to provide a sense of the economic strength and potential of a country, by asking three questions on a country's contribution to science and technology, products and services, and being a creative place with cutting-edge ideas and new ways of thinking.

5.10 Scotland's overall score and ranking for Exports increased between 2014 and 2016 by 1.2 per cent and one rank. Scores for attributes are based on a scale from 1 to 7 (where 1 is low and 7 high). The score remained stable for contribution to

innovation and science, while the score increased for the attributes of products and services and Scotland as a creative place (see Table 5.1).

5.11 Scotland is ranked relatively high for its products and services (18th), indicating that consumers abroad value the quality of Scottish produce. However, Scotland's contribution to innovation in science and technology, and its creativity, are ranked outside the Top 20. This score does not reflect a negative view of these factors but rather a 'don't know/neutral' response, suggesting that the respondents did not recognise Scotland for these Export attributes when thinking about its reputation.

Table 5.1: NBISM Scotland's reputation for exports 2014 and 2016

	2014		2016	
	Rank	Score	Rank	Score
Exports (Average)	22	55.9	21	57
Contribution to innovation and science	24	4.2	24	4.2
Products and services	18	4.4	18	4.5
Country as a creative place	21	4.4	20	4.5

5.12 There was little to no variation across age groups in terms of the three attributes of Exports (see Table 5.2), apart from those 45 years and older consistently ranking Scotland higher across all three attributes of Exports compared with those in younger age groups.

Table 5.2: NBISM Scotland's reputation for exports by age 2016

	Age			
	18 - 29	30 - 44	45 +	Average
Exports (Average)	57 (21)	56.7 (22)	57.4 (16)	57 (21)
Contribution to innovation and science	4.2 (24)	4.2 (24)	4.3 (21)	4.2 (24)
Products and services	4.5 (19)	4.5 (18)	4.5 (14)	4.5 (17)
Country as a creative place	4.5 (21)	4.4 (22)	4.5 (17)	4.5 (20)
Average	4.4	4.4	4.4	4.4

5.13 Business/executives consistently scored Scotland higher for Exports across all export attributes. However, participants in this group tended to give countries higher scores overall compared to those in other occupations. As a result, in terms of rank, business/executives ranked Scotland lower than those in other occupations (see Table 5.3).

5.14 Those who had visited Scotland scored Scotland almost 10 points higher for exports than those who had not, and scored Scotland higher on each Export attribute. However, people who have visited a country consistently gave the visited country higher scores overall.

5.15 The same pattern holds for those who had visited a Scottish website. Participants who had visited a Scottish website consistently scored Scotland higher for Exports, and for each attribute of Exports, than those who had not. However, in terms of rank there was little difference between groups.

Table 5.3: NBISM How Scotland's exports are viewed: occupation & tourism 2016

Occupation	Business/Executive	Other
Contribution to innovation and science	4.4 (24)	4.2 (23)
Products and services	4.7 (17)	4.4 (16)
Country as a creative place	4.6 (21)	4.4 (20)
Average	59.6 (22)	56 (21)
Visited Scotland	Yes	No
Contribution to innovation and science	4.8 (23)	4.1 (23)
Products and services	5.1 (16)	4.4 (17)
Country as a creative place	4.9 (21)	4.4 (20)
Average	65.9 (19)	55.7 (21)
Visited a Scottish website	Yes	No
Contribution to innovation and science	4.7 (24)	4.1 (23)
Products and services	5 (17)	4.4 (17)
Country as a creative place	5 (21)	4.4 (20)
Average	64.8 (22)	55.3 (21)

5.16 Participants were asked to select one or more words that best describe Scotland's products and services (from a choice of ten). The most popular words were:

- Agriculture (23 per cent)
- Food (15 per cent)
- Crafts (14 per cent).

The least popular words were Automotive, Film and television, and Oil (6 per cent each).

Governance

5.17 The Governance dimension aims to explore perceptions of how a country is governed domestically, including whether the government is competent, honest and fair to its citizens, and how it acts internationally through its contribution to global policy issues such as poverty, environmental protection, and international peace.

5.18 Governance continues to be perceived as one of Scotland's strongest national competencies, (ranked as 12th across all countries in the Index, along with Tourism). Perceptions of Governance improved Scotland's rank between 2014 and 2016, although the score showed little change (see Table 5.4). This is because rank is responsive to changes in the sample of evaluated countries while absolute score is not. Countries which scored higher than Scotland were, in the main, high income democracies, mostly in Western Europe.

Table 5.4: NBISM Scotland's reputation for governance 2014 and 2016

	2014		2016	
	Rank	Score	Rank	Score
Governance (Average)	14	62.2	12	62.4
Competent and honest	15	4.7	12	4.7
Fair and respectful of citizens' rights	14	5	12	5
International peace and security	14	4.8	10	4.8
Environmental protection	14	4.7	10	4.8
Efforts to reduce global poverty	16	4.4	14	4.4

5.19 Scotland has maintained its reputation as being competently and honestly governed, with all of the NBISM attributes within Governance ranked within the Top 15 countries, and two within the Top 10. The highest score in 2016, as in 2014, was in relation to Scotland's fairness and respect of citizens' rights.

5.20 The countries which gave Scotland the highest rankings for Governance overall were Scotland itself and the United Kingdom (both ranking Scotland 4th). The countries which gave Scotland the lowest rankings for Governance included South Korea (18th), Egypt and Japan (17th), and China (16th).

5.21 Those participants between the ages of 30 and 44 scored Scotland higher than those in the 18-29 age group for every attribute of Governance, while those 45 years and older scored Scotland higher for every attribute than those in the 30-44 age group. Thus, the older people were, the more positive their view of Scotland's Governance tended to be (see Table 5.5).

Table 5.5: NBISM Scotland's reputation for governance by age 2016

	Age			Average
	18 - 29	30 - 44	45 +	
Governance (Average)	60 (13)	61 (13)	65.2 (11)	62.4 (12)
Competent and honest	4.6 (14)	4.7 (14)	4.9 (10)	4.7 (12)
Fair and respectful of citizens' rights	4.8 (14)	4.9 (13)	5.2 (10)	4.9 (12)
International peace and security	4.6 (12)	4.7 (11)	5 (9)	4.8 (10)
Environmental protection	4.6 (12)	4.7 (11)	4.9 (10)	4.7 (10)
Efforts to reduce global poverty	4.3 (17)	4.3 (15)	4.5 (13)	4.4 (14)
Average	4.6	4.7	4.9	4.7

5.22 Those whose occupation was business/executive ranked Governance lower than those in other occupations. However, participants in the business/executive group gave higher scores for all Governance attributes than those in other occupations (See Table 5.6).

5.23 People who had visited Scotland scored Scotland higher on all attributes of Governance, and gave Scotland a better rank for International Peace and Security than those that had not visited Scotland. The same pattern holds for those who had visited a Scottish website, who gave higher scores for all attributes of Governance and scored Scotland higher for Governance overall than those who had not visited a Scottish website. Those who had visited a Scottish website also ranked Scotland higher than those who had not.

Table 5.6: NBISM How Scottish governance is viewed: occupation and tourism 2016

Occupation	Business/Executives	Other
Competent and honest	4.9 (13)	4.7 (12)
Fair and respectful of citizens' rights	5.1 (14)	4.9 (12)
International peace and security	4.9 (12)	4.8 (8)
Environmental protection	4.9 (11)	4.7 (10)
Efforts to reduce global poverty	4.5 (15)	4.3 (14)
Average	64.4 (13)	61.6 (11)

Visited Scotland	Yes	No
Competent and honest	5.2 (11)	4.7 (11)
Fair and respectful of citizens' rights	5.4 (11)	4.9 (11)
International peace and security	5.3 (6)	4.7 (10)
Environmental protection	5.1 (9)	4.7 (10)
Efforts to reduce global poverty	4.7 (12)	4.3 (12)
Average	69.5 (11)	61.2 (11)
Visited a Scottish website	Yes	No
Competent and honest	5.1 (11)	4.6 (12)
Fair and respectful of citizens' rights	5.3 (11)	4.9 (11)
International peace and security	5.2 (10)	4.8 (10)
Environmental protection	5.1 (11)	4.6 (10)
Efforts to reduce global poverty	4.8 (12)	4.3 (14)
Average	68.4 (10)	61 (12)

5.24 Participants were asked to select one word, from a choice of eight, that they felt best described the Government of Scotland. The most popular words were:

- Reliable (21 per cent)
- Trustworthy (21 per cent)
- Reassuring (12 per cent).

The least popular words were Unstable, Dangerous, and Corrupt (3 per cent each).

Culture

5.25 The Culture dimension measures three elements of a country's cultural reputation: cultural history and heritage, contemporary culture and sporting excellence.

5.26 Table 5.7 shows that Scotland's rank for Culture was higher in 2016 (16th) than in 2014 (19th), along with an increase in score of one point. While the score has only slightly improved between 2014 and 2016, Scotland's ranking for excellence in sports is much higher in 2016 than it was in 2014. The United Kingdom ranked Scotland higher (12th) than Scotland ranked itself (15th) for sporting excellence.

5.27 Scotland's rank for contemporary culture was also higher in 2016 than in 2014, increasing by three places, along with a slight increase in score. While Scotland ranked itself 8th for culture, the United Kingdom ranked Scotland 6th. Australia, Italy, Germany, South Africa, Canada, France, Poland, Sweden and the United States all ranked Scotland in the Top 15 nations.

Table 5.7: NBISM Scotland's reputation for culture 2014 and 2016

	2014		2016	
	Rank	Score	Rank	Score
Culture (Average)	19	59.1	16	60.1
Excellence at sports	28	4.1	23	4.2
Cultural heritage	11	5.0	12	5.0
Contemporary culture	16	4.5	13	4.6

5.28 Table 5.8 shows that those in older age groups consistently scored Scotland higher along every attribute of culture than younger age groups. Those aged 45 years and older placed Scotland within the Top 15 nations for contemporary culture, and in the Top 10 for cultural heritage.

Table 5.8: NBISM Scotland's reputation for culture by age 2016

Age				
	18 - 29	30 - 44	45 +	Average
Culture (Average)	58.6 (20)	59.8 (17)	61.4 (14)	60 (16)
Excellence at sports	4.1 (27)	4.2 (24)	4.2 (21)	4.2 (23)
Cultural heritage	4.8 (13)	5 (12)	5.2 (10)	5 (12)
Contemporary culture	4.5 (20)	4.5 (17)	4.6 (11)	4.5 (13)
Average	4.5	4.6	4.7	4.6

5.29 Those whose occupation was business/executive ranked Culture in Scotland higher than those in other occupations. Business/executives consistently gave higher scores for all attributes of culture, though this group tended to give higher scores to all nations. Those who had visited Scotland gave Scotland a higher score for all attributes of Culture than those who had not.

5.30 The same pattern for those who had visited Scotland holds for those who had visited a Scottish website, who gave higher scores for all attributes of Culture and scored Scotland higher for culture overall than those who had not visited a Scottish website. Even though the overall score for culture by those who had visited a Scottish website was higher (over 8 per cent), the rank was lower (18th compared to 16th for those who have not visited a Scottish website).

Table 5.9: NBISM How Scottish culture is viewed: occupation and tourism 2016

Occupation	Business/Executives	Other
Excellence at sports	4.3 (24)	4.1 (23)
Cultural heritage	5.1 (12)	5 (11)
Contemporary culture	4.7 (14)	4.5 (12)
Average	61.9 (16)	59.3 (16)
Visited Scotland	Yes	No
Excellence at sports	4.5 (30)	4.1 (23)
Cultural heritage	5.5 (10)	5 (11)
Contemporary culture	5 (14)	4.5 (12)
Average	66.5 (16)	59 (16)
Visited a Scottish website	Yes	No
Excellence at sports	4.5 (27)	4.1 (23)
Cultural heritage	5.4 (13)	5 (11)
Contemporary culture	5 (13)	4.4 (12)
Average	66.9 (18)	58.6 (16)

5.31 Asked which words respondents most associated with Scotland in relation to cultural activities or products (from a choice of ten) the most popular were:

- Museums (27 per cent)
- Music (20 per cent)
- Sports (17 per cent).

Circus (7 per cent) was the least popular term.

People

5.32 The People dimension explores participants' perceptions of how welcoming, friendly, and employable people from Scotland are.

5.33 Scotland continues to be highly regarded for its people, featuring overall in the Top 15 countries, and with each attribute featuring in the Top 20 countries. This dimension saw a rank increase from 2014, although there was also a slight decrease in score. The overall picture remains stable, with this dimension continuing to be Scotland's third strongest reputational feature. See Table 5.10.

Table 5.10: NBISM Scotland's reputation for its people 2014-2016

	2014		2016	
	Rank	Score	Rank	Score
People (Average)	15	65.1	14	65
Make you feel welcome	9	4.9	9	4.8
Friendly	13	4.9	13	4.9
Valuable employees	18	4.9	17	4.9

5.34 Scotland's people are perceived similarly to other small, high income, Western European democracies on the index. The countries which ranked the Scottish people the highest were the United Kingdom and Scotland (4th), Australia (5th), the United States (6th), and Sweden (7th). The countries which ranked Scotland the lowest on this dimension include Egypt (31st), Argentina (25th), Japan and Turkey (22nd).

5.35 Considering score, the United Kingdom (5.3) and Germany (5.3) rated the welcoming trait of Scotland's people higher than Scotland rated itself (5.2). The United Kingdom also viewed the Scottish people as more employable than the Scottish viewed themselves, ranking Scotland 2nd in the world, only behind itself.

5.36 As with perceptions of Exports, Governance and Culture, participants in older age groups tended to score Scotland higher in relation to all three attributes of its People than did those in younger age groups (Table 5.11).

Table 5.11: NBISM Scotland's reputation for people by age 2016

	Age			Average
	18 - 29	30 - 44	45 +	
People (Average)	63.4 (16)	63.9 (15)	67.5 (10)	65 (14)
Make you feel welcome	4.7 (16)	4.7 (12)	5 (7)	4.8 (9)
Friendly	4.8 (15)	4.8 (13)	5 (7)	4.9 (13)
Valuable employees	4.8 (21)	4.9 (17)	5.1 (12)	4.9 (16)
Average	4.8	4.8	5	4.9

5.37 As for dimensions reported previously, those participants whose occupation was business/executive tended to rank the Scottish People higher than did those in other occupations. Business/executives consistently gave higher scores for all attributes of People, though this group tended to give higher scores to all countries.

5.38 Those participants who had visited Scotland ranked the Scottish people 6th in the world overall. However, there was a difference between those who had visited Scotland and those who had not. The former group gave Scotland's People a score of 73 and a rank of 6th, while those who had not visited, gave Scotland a score of 64 and a rank of 15th. The same pattern held for those who had, and had not, visited a Scottish website (see Table 5.12).

Table 5.12: NBISM How Scottish people are viewed: occupation and tourism 2016

Occupation	Business/Executives	Other
Make you feel welcome	4.9 (10)	4.8 (9)
Friendly	5 (12)	4.8 (13)
Valuable employee	5.1 (15)	4.9 (15)
Average	67.1 (15)	64.4 (14)
Visited Scotland	Yes	No
Make you feel welcome	5.4 (6)	4.8 (10)
Friendly	5.3 (10)	4.8 (13)
Valuable employee	5.4 (8)	4.9 (15)
Average	73 (6)	64 (15)
Visited a Scottish website	Yes	No
Make you feel welcome	5.2 (10)	4.8 (9)
Friendly	5.4 (7)	4.8 (13)
Valuable employee	5.4 (11)	4.8 (17)
Average	72.5 (9)	63.5 (14)

5.39 Asked to select one or more words from a choice of ten that respondents felt best described the Scottish People, the most popular words were:

- Hard-working (28 per cent)
- Honest (23 per cent)
- Skilful (21 per cent)
- Fun (17 per cent)
- Tolerant (15 per cent).

The least popular words were Ignorant, Lazy, and Aggressive (4 per cent each).

Tourism

5.40 The Tourism dimension focuses on participants' perception of a country's attractiveness as a tourist destination. It explores people's willingness to visit Scotland should money be no object, their opinion about Scotland's natural beauty as well as its historic buildings and monuments, and whether they perceive Scotland's cities to be vibrant.

5.41 Tourism remains one of Scotland's key perceived strengths, ranking 12th alongside Governance in 2016. Scotland's score for Tourism increased slightly in 2016. Natural beauty continues to be perceived as Scotland's strongest characteristic, followed by Scotland's historic heritage.

Table 5.13: NBISM Scotland's reputation for tourism 2014-2016

	2014		2016	
	Rank	Score	Rank	Score
Tourism (Average)	12	68.6	12	68.7
Would visit if money were no object	13	5.3	13	5.2
Natural beauty	7	5.4	6	5.3
Historic buildings and monuments	12	5.0	12	5
Vibrant cities and urban attractions	22	4.8	20	4.8

5.42 On a country level, the United Kingdom ranked Scotland 2nd for Tourism only after itself. Scotland ranked itself 3rd, after the United Kingdom (1st) and Italy (2nd). Other countries which ranked Scotland in the Top 10 for Tourism include Sweden (6th), Australia (8th), France, Germany and Italy (9th), and Canada (10th).

5.43 People who have visited Scotland ranked Scotland slightly lower (7th) in terms of natural beauty compared to those who have not visited Scotland (6th).

5.44 As in relation to other dimensions, there was a notable difference between age groups regarding their perception of Scotland. Those aged 45 years and older ranked and scored Scotland higher overall than younger age groups, and this was consistent for all attributes of Tourism (Table 5.14).

Table 5.14: NBISM Scotland's reputation for tourism by age 2016

	Age			
	18 - 29	30 - 44	45 +	Average
Tourism (Average)	66 (17)	67.9 (14)	71.3 (9)	68.7 (12)
Would visit if money was no object	5.1 (15)	5.2 (14)	5.4 (10)	5.2 (13)
Natural beauty	5.1 (9)	5.3 (9)	5.6 (6)	5.3 (6)
Historic buildings and monuments	4.8 (13)	5 (12)	5.2 (12)	5 (12)
Vibrant cities and urban attractions	4.7 (26)	4.8 (23)	4.9 (16)	4.8 (21)

5.45 Those whose occupation was business/executive tended to score the attractiveness of Scotland as a tourist destination higher than those in other occupations. Business/executives consistently gave higher scores for all attributes of Tourism, though this group tended to give higher scores to all countries.

5.46 Those who had visited Scotland also gave Scotland a higher score for all attributes of Tourism than those who had not. The same pattern holds for those who had visited a Scottish website, who gave higher scores for all attributes of Tourism and scored Scotland far higher overall than those who had not (Table 5.15).

Table 5.15: NBISM How the world views Scottish tourism by occupation & tourism 2016

Occupation	Business/Executives	Other
Would visit if money were no object	5.5 (13)	5.2 (13)
Natural beauty	5.4 (7)	5.3 (6)
Historic buildings and monuments	5.2 (12)	5 (12)
Vibrant cities and urban attractions	4.9 (21)	4.7 (19)
Average	70.9 (12)	67.8 (12)
Visited Scotland	Yes	No
Would visit if money were no object	5.7 (8)	5.2 (12)
Natural beauty	5.7 (7)	5.3 (6)
Historic buildings and monuments	5.5 (10)	5 (12)
Vibrant cities and urban attractions	5.2 (18)	4.7 (22)
Average	75.6 (11)	67.6 (12)
Visited a Scottish website	Yes	No
Would visit if money were no object	5.8 (11)	5.1 (13)
Natural beauty	5.7 (9)	5.3 (6)
Historic buildings and monuments	5.5 (13)	4.9 (12)
Vibrant cities and urban attractions	5.2 (25)	4.7 (20)
Average	76 (11)	67 (12)

5.47 Respondents were asked to select one or more words from a choice of ten that respondents felt best described the experience of visiting Scotland. The most commonly selected words were:

- Fascinating (29 per cent)
- Exciting (24 per cent)
- Educational (22 per cent)
- Relaxing (21 per cent).

The least popular word was Depressing (3 per cent).

Immigration and investment

5.48 The immigration and investment dimension explores whether participants perceive a country to be a good place to live, work, study, and invest in.

5.49 Scotland's score for immigration and investment has not experienced a meaningful change since 2014, changing by 0.3 percentage points. Scotland's rank remained stable at 17th. Across the five attributes, there was no noticeable score increase between 2014 and 2016.

Table 5.16: NBISM Scotland's reputation for immigration and investment 2014-2016

	2014		2016	
	Rank	Score	Rank	Score
Immigration and investment (Average)	17	59.9	17	60.2
Willingness to live and work	13	4.5	14	4.4
Quality of life	17	4.9	16	4.9
Educational qualifications	15	4.6	15	4.6
Business to invest in	19	4.2	18	4.2
Equal opportunity	15	4.7	13	4.7

5.50 Scotland's reputation for immigration and investment is perceived similarly to other small, high income, liberal Western European democracies on the index. The countries which gave Scotland the highest rankings were Scotland itself (3rd) and the United Kingdom (which ranked Scotland 4th).

5.51 Table 5.17 shows that the age pattern for Immigration and Investment shows the same pattern as other dimensions, with those in older age categories scoring Scotland higher than those in lower age categories. However, the relationship between score and age was weaker for Immigration and Investment in comparison to other dimensions.

Table 5.17: NBISM Scotland's reputation for immigration and investment by age 2016

	Age			
	18 - 29	30 - 44	45 +	Average
Immigration and investment (Average)	59.6 (18)	59.7 (17)	60.8 (13)	60.2 (17)
Willingness to live and work	4.4 (15)	4.4 (15)	4.4 (11)	4.4 (14)
Quality of life	4.8 (17)	4.9 (16)	5 (16)	4.9 (16)
Educational qualifications	4.6 (18)	4.7 (17)	4.7 (14)	4.6 (14)
Business to invest in	4.3 (21)	4.2 (19)	4.1 (15)	4.2 (18)
Equal opportunity	4.6 (16)	4.6 (13)	4.9 (11)	4.7 (13)

5.52 As with dimensions reported above, those participants whose occupation was business/executive tended to rank Immigration and Investment in Scotland higher than those in other occupations. Business/executives consistently gave higher scores for all attributes of Immigration and Investment, though this group tended to give higher scores to all countries. Those who had visited Scotland gave Scotland a higher score for all attributes of Immigration and Investment. Those who had visited a Scottish website also gave higher scores for all attributes of Immigration and Investment than those who had not. See Table 5.18.

Table 5.18: NBISM How the world views immigration and investment in Scotland by occupation & tourism 2016

Occupation	Business/Executives	Other
Willingness to live and work	4.6 (14)	4.3 (14)
Quality of life	5.1 (16)	4.9 (16)
Educational qualifications	4.8 (14)	4.6 (14)
Business to invest in	4.4 (18)	4.1 (18)
Equal opportunity	4.9 (12)	4.6 (13)
Average	62.9 (16)	59 (16)
Visited Scotland	Yes	No
Willingness to live and work	5.1 (10)	4.3 (14)
Quality of life	5.3 (15)	4.9 (16)
Educational qualifications	5.2 (9)	4.6 (16)
Business to invest in	4.6 (29)	4.1 (18)
Equal opportunity	5.2 (10)	4.6 (12)
Average	68.4 (10)	58.7 (16)
Visited a Scottish website	Yes	No
Willingness to live and work	5.2 (13)	4.3 (14)
Quality of life	5.4 (15)	4.8 (16)
Educational qualifications	5.2 (18)	4.5 (14)

Business to invest in	4.9 (19)	4 (18)
Equal opportunity	5.2 (11)	4.6 (13)
Average	69.5 (16)	58 (16)

5.53 For the immigration and investment dimension, respondents were asked to choose one word that they felt best describes Scotland's current economic and business conditions from a choice of eight words. The most popular were:

- Modern (20 per cent)
- Forward thinking (14 per cent)
- Developing (13 per cent)
- Ambitious (11 per cent).

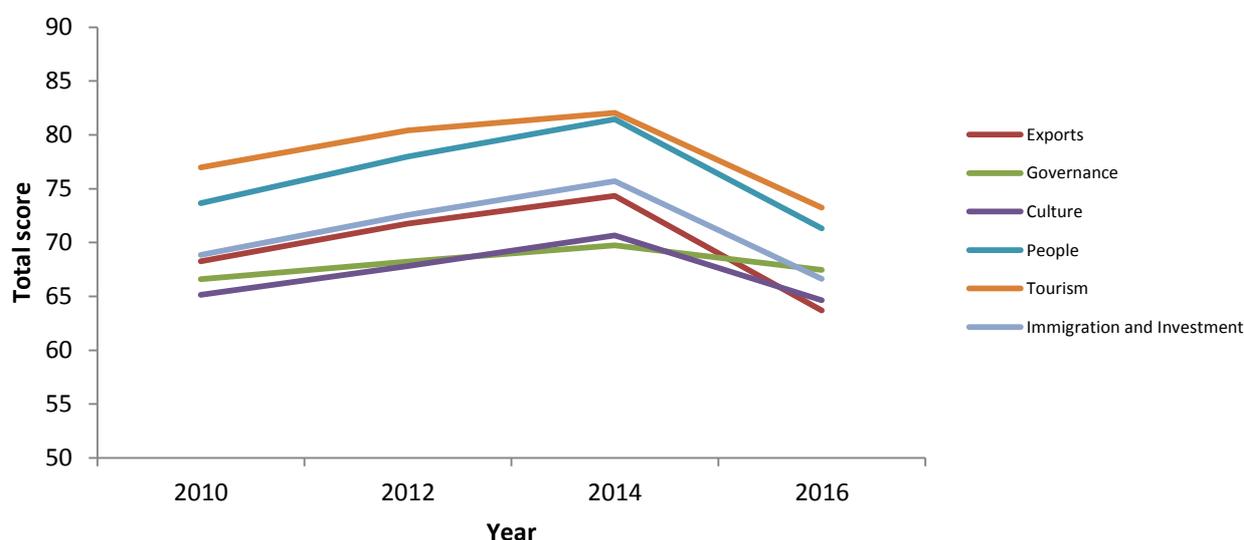
The least popular word was Backward (2 per cent).

6. How Scotland sees itself

6.1 In the 2010, 2012, 2014 and 2016 NBISM surveys, Scotland was included as a core panel country (a country where fieldwork was conducted to explore that country's views of other countries) as well as one of the rated countries (countries respondents are asked about).

6.2 As figure 6.1 illustrates, the score for how Scotland viewed itself increased each year between 2010 and 2014 across the six dimensions of reputation. However, this is followed by a decrease across all six dimensions between 2014 and 2016 by an average of nearly 8 percentage points. The least affected dimension was Governance, which experienced a decline of less than 3 percentage points, while the dimension which experienced the greatest decrease was Exports, falling by nearly 11 percentage points.

Figure 6.1: NBISM How Scotland sees itself (score) according to the six dimensions of reputation 2016¹⁰



6.3 In terms of rank, Scotland consistently ranked itself 1st overall between 2010 and 2014. For individual dimensions, Scotland ranked itself 1st for Governance, People, Tourism, Immigration and Investment, and 2nd or 3rd for Exports and Culture every year between 2010 and 2014. However, in 2016, Scotland did not rank itself 1st on any of the six dimensions. In addition, each dimension fell by an average of 3 rank places (see Table 6.1).

¹⁰ Scotland was not a panel country in 2008 and 2009 and did not subscribe in 2011, 2013, 2015.

Table 6.1: NBISM How Scotland sees itself in terms of the six dimensions of reputation 2010-2016

	2010	2012	2014	2016
Exports	68.3 (3)	71.8 (2)	74.3 (2)	63.7 (5)
Governance	66.6 (1)	68.2 (1)	69.7 (1)	67.5 (4)
Culture	65.2 (3)	67.8 (3)	70.7 (3)	64.6 (8)
People	73.7 (1)	78 (1)	81.5 (1)	71.3 (4)
Tourism	77 (1)	80.4 (1)	82 (1)	73.3 (3)
Immigration and investment	69 (1)	72.6 (1)	75.7 (1)	66.6 (3)
Favourability	85.7 (1)	90 (1)	91.4 (1)	78.6 (3)
Average	69.9 (1)	73 (1)	75.7 (1)	67.8 (3)

6.4 Favourability towards Scotland was also consistently ranked 1st between 2010 and 2014. However, in 2016, Scotland ranked itself 3rd overall behind the United Kingdom (1st) and Canada (2nd). These changes were not due to changes in the sample of evaluated countries as both the scores and ranks changed proportionally in the same direction.

Table 6.2: NBISM How Scotland sees itself disaggregated by the 23 attributes 2010-2016

	2010	2012	2014	2016
Exports				
Contribution to Innovation and Science	5.1 (4)	5.3 (4)	5.4 (4)	4.7 (10)
Products and services	5.3 (2)	5.5 (1)	5.6 (1)	5 (2)
Country as a creative place	4.9 (4)	5.1 (4)	5.3 (4)	4.7 (9)
Average	68.3 (3)	71.8 (2)	74.3 (2)	63.7 (5)
Governance				
Competent and honest	4.9 (3)	4.9 (4)	4.9 (8)	4.9 (8)
Fair and respectful of citizens' rights	5.2 (1)	5.3 (1)	5.4 (5)	5.3 (3)
International peace and security	5.3 (1)	5.3 (1)	5.4 (1)	5.3 (3)
Environmental protection	4.8 (1)	5 (1)	5.1 (1)	5 (4)
Efforts to reduce global poverty	4.7 (1)	4.8 (2)	5 (1)	4.8 (3)
Average	66.6 (1)	68.2 (1)	69.7 (1)	67.5 (4)
Culture				
Excellence at sports	4.2 (17)	4.4 (14)	4.7 (12)	4.4 (15)
Cultural heritage	5.5 (1)	5.6 (1)	5.7 (1)	5.34 (6)
Contemporary culture	4.9 (3)	5.1 (2)	5.3 (3)	4.8 (4)
Average	65.2 (3)	67.8 (3)	70.7 (3)	64.6 (8)
People				
Make you feel welcome	5.5 (1)	5.8 (1)	6 (1)	5.2 (5)
Friendly	5.3 (1)	5.5 (1)	5.8 (1)	5.1 (4)
Valuable employee	5.4 (2)	5.6 (1)	5.8 (2)	5.4 (3)
Average	73.7 (1)	78 (1)	81.5 (1)	71.3 (4)
Tourism				
Would visit if money were no object	5.6 (2)	5.9 (1)	6.1 (1)	5.4 (8)
Natural beauty	5.9 (1)	6.1 (1)	6.2 (1)	5.6 (2)
Historic buildings and monuments	5.7 (1)	5.9 (1)	5.9 (1)	5.4 (6)
Vibrant cities and urban attractions	5.2 (3)	5.4 (3)	5.4 (4)	5.1 (7)
Average	77 (1)	80.4 (1)	82 (1)	73.3 (3)

Immigration and investment				
Willingness to live and work	5.6 (2)	6 (1)	6.2 (1)	5 (2)
Quality of life	5.2 (5)	5.3 (5)	5.5 (4)	5.1 (9)
Educational qualifications	5.5 (2)	5.6 (1)	5.7 (2)	5.2 (4)
Business to invest in	4.5 (2)	4.6 (1)	4.9 (1)	4.4 (5)
Equal opportunity	4.9 (1)	5.2 (1)	5.4 (1)	5.2 (2)
Average	68.9 (1)	72.6 (1)	75.7 (1)	66.6 (3)

6.5 If the dimensions are disaggregated by their underlying attributes, the pattern of lower scores and ranks is consistent across all 23 attributes. Scotland's view of itself was higher between 2010 and 2014 on every attribute besides views regarding the competency and honesty of the Scottish government. However, between 2014 and 2016, Scotland's perception of itself was lower in terms of score across all attributes. The attributes which declined most were willingness to live and work in Scotland, how welcome people feel in Scotland, and how friendly Scottish people are.

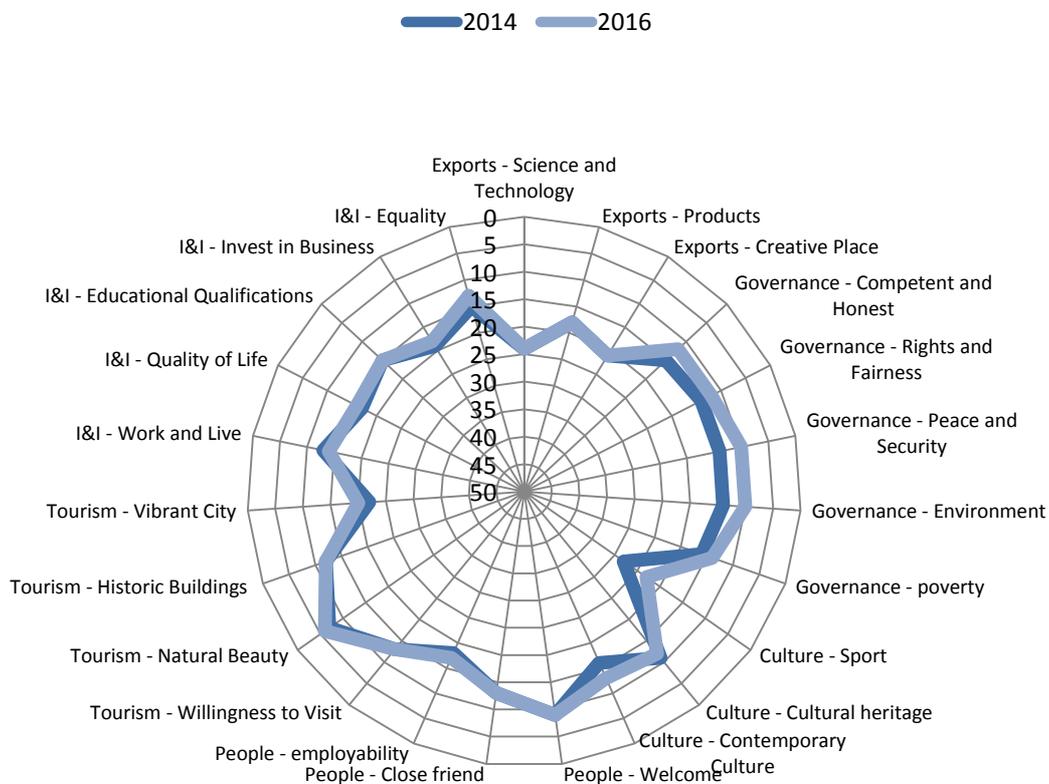
7. Summary

7.1 Scotland's score of 62.2 per cent and rank of 15th on the NBISM show that Scotland continues to have a strong reputation abroad, and places it alongside and sometimes ahead of other comparator small, high income Western nations. Scotland's relative rank has improved overall from 2014, rising two places from 17th to 15th. In terms of absolute score, Scotland has improved from 61.8 per cent in 2014 to 62.2 per cent in 2016, an overall change of 0.4 points. This is the highest score Scotland has received since the baseline study of 2008.

7.2 As outlined in section 3, across the six NBISM dimensions, respondents were asked a total of 23 questions. Using the concept of the NBISM hexagon, these attributes are visually summarised in Figure 7.1, where the centre of the circle represents the position of rank 50 (last), and the outer circle represents the first (and most reputable) position.

7.3 Figure 7.1 shows that when all six NBISM dimensions of Scotland's reputation are considered, Tourism, Governance, and People continue to be the dimensions most recognised by the participants from around the world. Out of the primary dimensions, Scotland's score on Governance showed the greatest improvement.

Figure 7.1: NBISM Scotland's reputation across the 23 attributes 2014 and 2016 (by rank)



7.4 For the most part, participants from across the world are able to distinguish between the different aspects of Scotland's reputation. Participants from certain countries are more familiar with Scotland and are 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.

7.5 While Scotland's score has increased between 2014 and 2016, the change of 0.4 is below the 1.0 percentage point threshold for Scotland's National Indicator 5, indicating that Scotland's reputation is 'maintaining' internationally.



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