

The Anholt GfK Roper's Nation
Brands Index: Summary Report for
Scotland 2010

THE ANHOLT GFK-ROPER NATION BRANDS INDEXSM: SUMMARY REPORT FOR SCOTLAND 2010

Scottish Government Analytical Services

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1 EXECUTIVE SUMMARY

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

1.2 Scotland's score (59.7)³ and rank (15th) shows that it continues to have a unique reputation abroad compared to nations of similar size. Scotland's reputation is stable in comparison to its 2009 performance in terms of its score (60.0 in 2009) and rank (14th in 2009). A statistical assessment of change against the 2009 score for the purposes of Scotland Performs shows that Scotland's performance is maintaining.

1.3 Scotland continues to score highly, placed as it is in the top 20 nations and it is scored and ranked similarly and often ahead of the other smaller, high income liberal democracies on the index: New Zealand, Denmark, Finland and Ireland.⁴

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

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

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

³ The NBISM scores range from 1 to 100

⁴ The Scottish Government is unable to publish the scores and ranks relating to the performance of other countries on the NBI that is not already in the public domain because it is owned by GfK Roper and commercially sensitive. The top 10 scores and ranks for the NBI 2010 are publicly available on the GfK Roper website

2 INTRODUCTION

2.1 The Scottish Government's purpose is to create a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth.⁵ Its National Performance Framework explains what government in Scotland wants to achieve and recognises the role that a strong, positive reputation can play. In light of the economic recession, the need to forge and adapt to new ways of building Scotland's reputation has increased.⁶

2.2 In an increasingly busy world, where countries are able to communicate vast amounts of information about themselves, the issue of reputation management has become more important. Having an awareness of how people perceive your country - like its people, its businesses, services and products, its tourism and culture, and its education and employment opportunities – is a vital piece of knowledge to have. This is because, in the widest sense, people are the consumers, the tourists, the economic migrants, international students, and investors making decisions about what to buy, where to work and visit etc. Given that people are likely to only think about countries other than their own occasionally, if at all, a country's reputation must be both accurate and clear, if it is to be thought of as interesting and worthy of attention.

2.3 The theory and practice of reputation management has been called Competitive Identity⁷ and the theory's leading proponent, Simon Anholt, argues that by coordinating efforts across the key drivers of reputation – such as tourism and exports – a nation can more effectively:

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

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

2.5 As part of the Scottish Government's National Performance Framework, one of its national indicators looks to assess progress to “improve people's perceptions,

⁵ The Government Economic Strategy, the Scottish Government, 2007

⁶ The Scottish Government Economic Recovery Programme, The Scottish Government, 2009

⁷ Competitive Identity, Anholt A, Palgrave MacMillan, 2007

attitudes and awareness of Scotland's reputation".⁸ And there is a lot of information and data already available from different parts of government about how their own specific activities relate to this objective: policy engagement with other European countries, USA, India and China, as well as the efforts of its agencies and partners at VisitScotland, Scottish Development International and others who have a part in communicating Scotland overseas.

2.6 However, in order to make an assessment of the National Indicator, it is vital that any analysis looks at Scotland's reputation *as a whole*. An evaluation of government only activity or in relation to one part of Scotland's image, e.g. as a tourist destination, would not provide a complete picture. To therefore see how strong Scotland's overall reputation is in global terms, compared to other countries, a survey was undertaken using the Anholt GfK-Roper Nation Brand Index. The data allows for a better understanding of Scotland's reputation as it exists in the minds of 20,000 people in 20 online country panels⁹ around the world; and as it compares to the 49 countries on the Nation Brand Index.

2.7 The NBISM is not an indicator of government performance, because it is a short survey about Scotland in its very broadest sense and many of the people taking part in the survey will be working from a limited and/or out-of-date awareness of Scotland. Equally, it should not be looked on as an evaluation of any delivery agency/arm of government: these bodies are responsible for setting performance indicators and monitoring progress towards their delivery.

2.8 To use and understand the data from the survey properly, it is important that it is seen as a *snapshot* of people's *attitudes* about Scotland, not behaviours – attitudes and behaviours are different things. The NBISM is about perceptions, not reality and therefore tells us what people *think*. Attitudinal data of this kind is a very useful way of helping to understand more about how others see us and how we see ourselves.

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

Background to the Anholt GfK-Roper Nation Brand Index

2.10 The Anholt GfK-Roper Nation Brand IndexSM (NBI)¹⁰ is an analytical tool which attempts to measure and rank a country's reputation as a whole, i.e. not by just focusing on one particular dimension (e.g. a tourist destination). The NBISM provides an independent definition of reputation which allows it to be measured in a consistent and accessible way across a number of countries.

⁸ Scottish Budget Spending Review 2007, the Scottish Government, 2007

⁹ Twenty countries are selected for the survey for the NBI study; the survey strives to represent regional balance as well as balance between high-income and middle-income countries.

¹⁰ The Anholt-GfK Roper Nation Brands Index and Nation Brands Hexagon are trademarks and copyrights of Simon Anholt and GfK Roper

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

2.12 The surveys in 2008, 2009 and 2010, in which Scotland's reputation was scored and ranked, were published by the Scottish Government on the Scotland Performs website.¹¹ A summary report for Scotland's rank and score in 2009 was also published by the Scottish Government¹². This report looks at the data available from the survey in 2010, making comparisons with the 2009 scores and ranks where possible. As Chapter 3 explains, the statistical assessment of the change between Scotland's score in 2010 compared with the 2009 score shows that Scotland's reputation is stable. This will be reviewed annually by the Scotland Performs Technical Assessment Group.

¹¹ <http://www.scotland.gov.uk/About/scotPerforms/indicators/reputation>

¹² <http://www.scotland.gov.uk/Publications/2010/03/26104609/9>

3 METHODOLOGY¹³

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

3.2 Exports. Examines panellist's image of products and services from each country, their view of a country's contribution to innovation in science and technology and the degree to which a country is recognised as a creative place.

3.3 Governance. Considers public opinion regarding the level of national government competency and fairness, as well as its perceived commitment to global issues such as peace, poverty and the environment.

3.4 Culture. Reveals global perceptions of each nation's heritage and appreciation for its contemporary culture and recognition of its sporting excellence.

3.5 People. Explores the population's reputation for employability, openness and welcome, as well as appeal of the people on a personal level

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

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

3.8 The NBISM score is an average of the scores from the six dimensions mentioned above. There are between 3 and 5 ratings questions for each of the dimensions. Ratings are based on a scale from 1 to 7 with 7 being the highest and best, 1 being the lowest and worst, and 4 being the middle position which is neither positive nor negative. Each hexagon point also has a word choice question which gives some depth to how those surveyed perceive a nation's image.

3.9 The 2010 NBISM survey was conducted in 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural, and tourism activities. Given the increasing global role played by developing countries, the survey strives to represent regional balance as well as the balance between high-income and middle-income countries. The core 20 panel countries are:

- Western Europe/North America: U.S., Canada, UK, Germany, France, Italy, Sweden

¹³ Because the NBI survey is designed and run by external contractors, GfK Roper, much of the text for this section is provided by the contractors. Additional information has been added by Government analysts to explain the Scottish Government's interests.

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

3.10 20,261 interviews have been conducted with approximately 1,015 interviews per country for the 2010 NBISM survey between July 7th and August 4th, 2010. Adults aged 18 or over who are online are interviewed in each country.¹⁴ Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender, and education of the 2010 online population in that country. Additionally, in the United States, United Kingdom, South Africa, India and Brazil, race/ethnicity has been used for sample balancing. The report reflects the views and opinions of online populations in these 20 countries; citizens who are connected to the world.

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

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

3.13 The list of 50 nations is as follows, listed by region:

- North America: U.S., Canada
- Western Europe: UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, Belgium, Switzerland, Finland, Austria, Luxembourg*, Flanders*
- Central/Eastern Europe: Russia, Poland, Czech Republic, Hungary, Turkey, Romania, Slovakia*, Estonia**, Lithuania**
- Asia Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Malaysia, Singapore, Taiwan, Australia, New Zealand

¹⁴ For Scotland approximately half of the sample will have been asked to rate and compare Scotland's reputation. Chinese panellists are asked of all nations except their own.

* Nations new to the NBI 2010 ** Nations included in 2009 but not included in 2010

- Latin America: Argentina, Brazil, Mexico, Chile, Peru, Cuba, Colombia, Ecuador**
- Middle East/Africa: United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Angola, Kenya

3.14 The NBISM did run between 2005 and 2007 on a quarterly basis and this was managed through another contractor. Since going to GfK Roper in 2008 and changing to an annual format, the index now has expanded coverage – regarding nations measured, and in the number of questions asked – and uses a more stringent sample distribution control. This means that there can be no trend comparisons made to pre-2008 data. Conscious efforts were made to keep the 2010 NBISM methodology comparable to the 2009 NBISM, including core questionnaire content, sample design, sampling techniques, and fieldwork procedures.¹⁵

Scotland Performs and National Indicator 45

3.15 The NBISM is used to assess progress against National Indicator 45, “improve people’s perceptions, attitudes and awareness of Scotland’s reputation”, which is part of Scotland Performs.¹⁶

3.16 According to the technical note for National Indicator 45, assessment of any change in Scotland’s performance is based on Scotland’s absolute score as it compares to the previous year’s score. The view of Scottish Government analysts is that, based on data for 2009 and 2010, Scotland’s performance has not changed and its performance on Scotland Performs is therefore “maintaining”.

3.17 While occasional dramatic shifts in how reputations are perceived from year-to-year are captured by the NBISM, in general the reputations of established nation brands tend to be stable. Across the index, the score and rank profile is largely the same from 2009 to 2010.

Interpreting the 2010 NBI Data

3.18 Like the vast majority of nations in the top twenty of the NBISM, Scotland’s reputation does not appear to have undergone any significant change between 2009 and 2010.

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

3.20 Government does have a key role to play in the management of a country’s reputation, but there are many factors and actors involved. The Scottish Government

¹⁵ Scotland did go on the NBI in Quarter 4 of 2007 before the survey changed. Scotland’s score and rank was used on Scotland’s Performs as a proxy measure for National Indicator 45 until the 2008 baseline was available.

¹⁶ <http://www.scotland.gov.uk/About/scotPerforms>

takes its part very seriously and has actively looked to co-ordinate and work with partners to develop and implement ways of strengthening and maintaining Scotland's reputation, e.g. the Scottish Government's International Framework¹⁷.

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

3.22 The contractors GfK Roper and Simon Anholt own the concept, data and intellectual rights. The Scottish Government is therefore restricted in what it can publish from the Nation Brand Index because GfK Roper have strong commercial interests in the use of the data. The data published and analysed in this report represents the core information on Scotland's position on the NBISM and has been checked by the contractors to ensure it complies with the Scottish Government's contractual obligations.

¹⁷ <http://www.scotland.gov.uk/Publications/2008/04/23150847/0>

4 OVERALL SCORE

Scotland's Position on the NBISM

4.1 Scotland's score of 59.7¹⁸ and rank places it in the top 15 nations and shows that Scotland has a high level of recognition as a smaller nation. Its reputation scores and ranks alongside and often ahead of other smaller, high income liberal democracies, like Denmark, Finland, Ireland and New Zealand. This shows that people can accurately identify Scotland in these terms, despite not currently having the same constitutional status as these other nation states.¹⁹

4.2 Table 1.1 clearly shows that the UK panel is generally the most positive and favourable towards Scotland of all panel countries, which highlights the strong and positive nature of the links between them²⁰.

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

Panel Countries	Scotland's rank	Panel Countries	Scotland's Rank
United Kingdom	5	Japan	17
United States	8	China	18
Australia	12	Mexico	19
Sweden		Poland	
Canada	13	South Korea	
Germany	15	Russia	20
South Africa		Argentina	21
Brazil	17	India	
France		Turkey	23
Italy		Egypt	32

NBISM rankings range from 1-50

4.3 Table 1.1 shows that nearly all of the panel countries rank Scotland somewhere in 10th to 25th place among the 50 countries, with the notable exceptions of the UK (5th), US (8th) and Egypt (32nd).²¹ Scotland's reputation remains strongest in the UK and among its Western European neighbours, as well as in the United States and Canada, two North American countries which have strong historic and genealogical ties back to Scotland. Except for Australia, Scotland's reputation begins to fade as you go south from there into Mexico and into Latin America, or move east into Eastern Europe and Asia. It is also true for other

¹⁸ NBISM scores range from 1-100.

¹⁹ While Scotland is part of a larger state, i.e. the United Kingdom, at no point in the survey is this information given, although some individuals responding to the survey will be aware of the fact that Scotland is part of the UK. There are no specific survey questions that allow the relationship between the UK and Scotland's reputations to be directly explored.

²⁰ It is likely that some of the UK sample being asked about Scotland are either living in Scotland and/or are from Scotland. However, we cannot tell how many fall into these categories from the data available.

²¹ Although Scotland is ranked 32nd by Egypt, this should not be mistaken as a "negative" view of Scotland's reputation. An analysis of the Egypt sample's scores across each dimension and its levels of favourability and familiarity with Scotland suggest that, rather than holding a negative view of Scotland's reputation, it is more a case of not knowing enough about Scotland, i.e. don't know/neutral.

countries that cultural links and geography seem to matter when it comes to reputation.

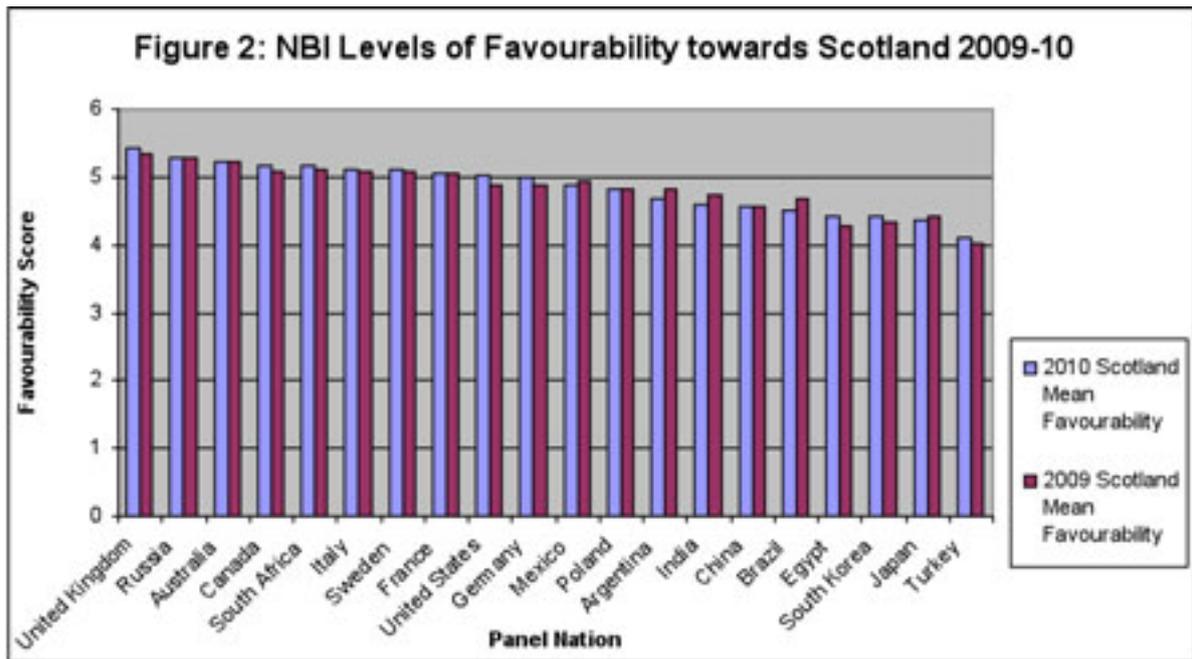
4.4 Looking at score and rank together is important because that way it is possible to see the different messages about Scotland's reputation. Scotland's reputation is stable in comparison to its 2009 performance in terms of its score (60.0 in 2009) and rank (14th in 2009). Although Scotland ranks 15th, its score is much closer to the top of the index than it is to the bottom and it is in the group of smaller, high income countries that sit just outside the top 10 nations.

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

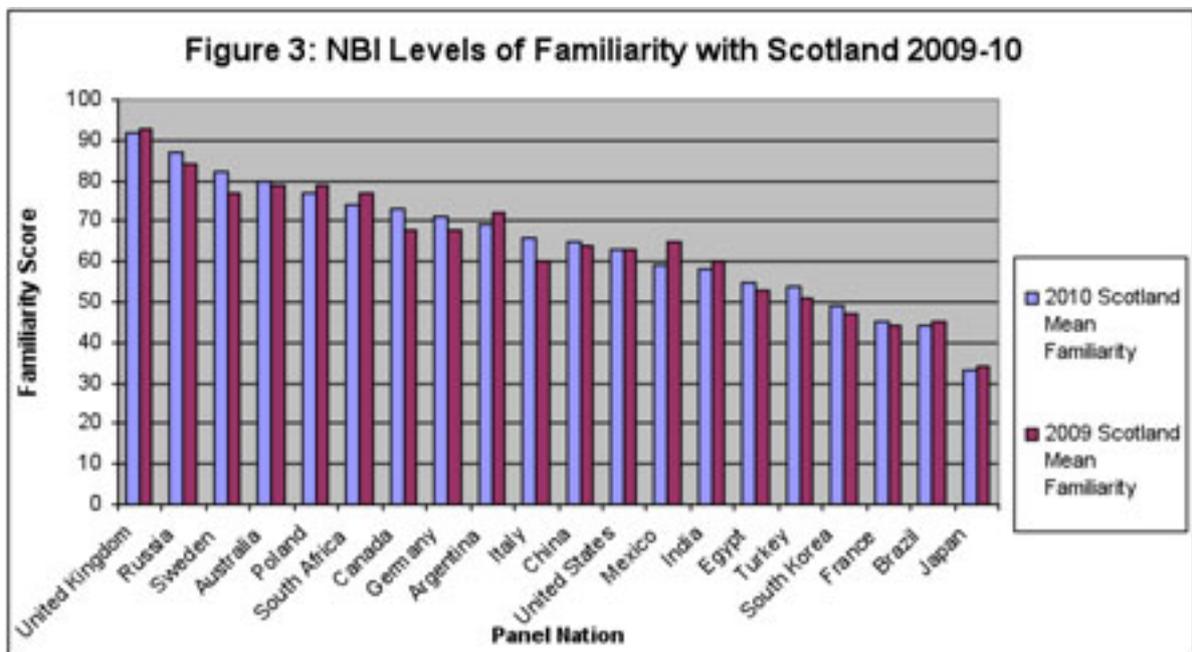
4.6 While it should be kept in mind that each of these questions are basic and rely on the panellists' own understanding of what it means to "know" and feel favourable towards a nation (on a scale of 1-7), both questions offer another interesting insight into how people instinctively perceive a country's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

4.7 On favourability, as Figure 2 shows, levels of favourability have stayed largely stable between 2009 and 2010 – Scotland continues to be viewed favourably.²² Sixteen of the twenty panel countries in 2010 were more favourable to Scotland than their national average for favourability, two were in line with their national average, and only two countries (Turkey and Egypt) had levels of favourability below their national average. It should be noted that the vast majority of scores are positive and no panel nations were unfavourable to Scotland, giving a score of below 4.0.

²² When comparing the levels of familiarity and favourability between years it is important to note that the NBI does not sample the same people every year. The sample strategy for the survey means that the survey asks questions of people who share similar characteristics, gender split etc, as the previous year.



4.8 Familiarity is of key importance. Other research indicates that how familiar an individual is with a place can positively affect their perceptions.²³ As Figure 3 illustrates, the NBISM panels in 2010 generally appear to have a similar level of familiarity with Scotland as they had in 2009.



4.9 Because the NBISM does not sample the same individuals year on year, it is not possible to say that particular nations have become less familiar with Scotland. For example, in the case of India, the 2010 panel is less slightly familiar with

²³ TNS System 3, USA Strategy Research Report, The Scottish Government, 2007

Scotland compared to the 2009 Indian panel. How familiarity levels link to panellists' wider views on reputation is of great interest to researchers working with this data.²⁴

How Scotland Sees Itself

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

Summary

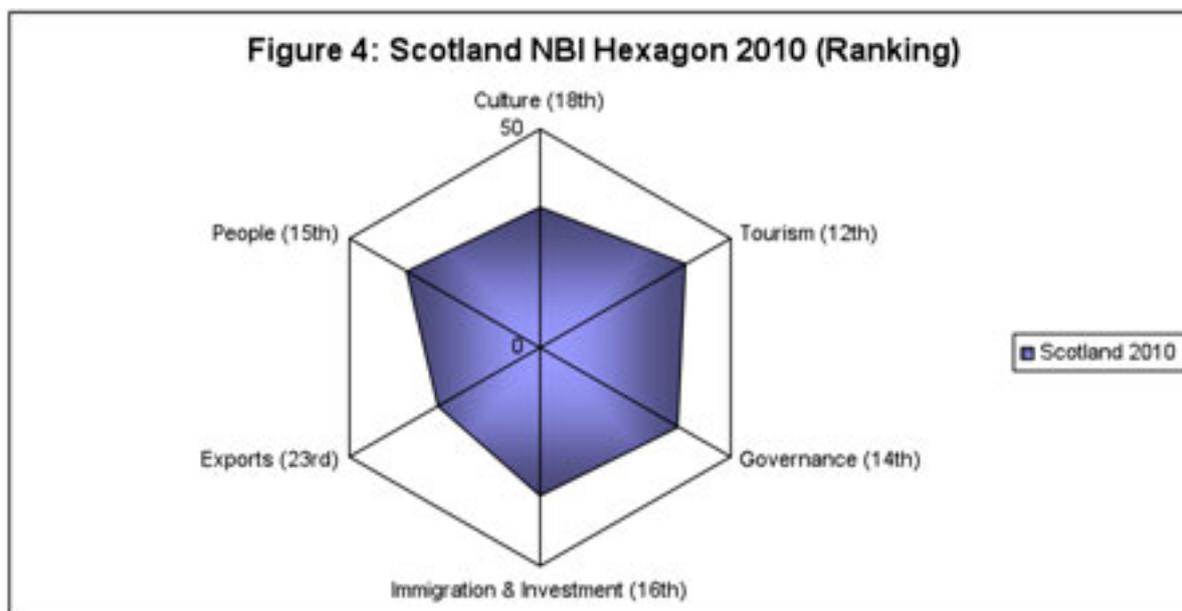
4.11 This chapter has shown the importance of seeing Scotland's performance on the NBISM in context: score, rank, comparisons with other smaller nations, checking for significant year-on-year changes, favourability and familiarity all allow the reader to build a sense of how Scotland's reputation is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

4.12 Overall, between 2009 and 2010 Scotland's reputation remained stable, with its position on the NBISM continuing to communicate a strong and positive reputation as a smaller, high income liberal democracy. For the purposes of Scotland Performs and deciding whether there has been a real change from Scotland's 2009 score, Scotland's performance symbol as "maintaining"; this will be reviewed on an annual basis.

²⁴ Regression analysis carried out by Scottish Government Analytical Services to look at the statistical relationship between familiarity and favourability shows that levels of favourability can be explained by familiarity and vice versa.

5 SCOTLAND'S 6 DIMENSIONS OF REPUTATION

5.1 The 2010 Nation Brand Hexagon© diagram in Figure 4 below shows that Scotland continues to have a strong and fairly balanced image, rating as a top twenty country on five of the six dimensions – this is the same as in previous years. Tourism remains the dimension which panellists are most comfortable with when asked to think about Scotland's reputation – they know Scotland's reputation in these terms. Exports is still an area of reputation where those surveyed do not instinctively recognise Scotland's reputation.²⁵



The Nation Brand Hexagon
© 2000 Simon Anholt

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

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

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

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

²⁵ Although Exports is Scotland's lowest ranking dimension, an analysis of the scores for these questions show that panellists don't know or are neutral to Scotland when asked about its reputation in these terms. It is not the case that people know Scotland for Exports and think it has a poor reputation – it is rather they don't know Scotland for having a reputation in these terms.

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

Exports

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

5.7 Scotland's reputation for Exports has not changed between 2009 and 2010 - although its rank shifted from 21st to 23rd, the picture looks the same. Exports remain Scotland's lowest ranking dimension on the NBISM. Scores for Scotland and the four other smaller, high income, liberal democracies on the NBISM, (New Zealand, Ireland, Denmark and Finland) are all ranked fairly close together; however 3 comparator nations rank higher than Scotland. As in 2009, Scotland receives higher ranks from established, high income panel countries with UK, USA, Sweden, Australia, and Canada being the most likely to recognise Scotland's reputation for Exports.

5.8 Looking at each of the 3 elements scored within Exports, Scotland's reputation for products and services was its strongest ranking question in this dimension (18th) in 2010 and in 2009. However, Scotland's scores in the Export dimension tended to fall in "don't know/neutral" categories, suggesting that people did not recognise Scotland for Exports when thinking about its reputation. It would therefore be inaccurate to say that panellists think Scotland has a negative/poor reputation for Exports.

5.9 The NBISM survey also asks a word association question for each of the dimensions. In the case of Exports, panellists most commonly selected "agriculture" (25%), "food" (16%), "crafts" (15%) and "banking" (12%) which is the same pattern seen in 2009.²⁶

Governance

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

5.11 Scotland's reputation for Governance has not changed between 2009 and 2010, and its ranking is still 14th on the NBISM. Governance remains Scotland's second strongest reputational feature overall, Scotland is positioned firmly amongst

²⁶ Panellists were able to select as many words from a list of 10 "Exports-related words".

other Western democracies and several places above the USA. However, 3 of its smaller nation comparators – Finland, Denmark and New Zealand – rank above Scotland.

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

5.13 Examining the different elements within Governance, Scotland's two highest ranking questions are around its contribution to global efforts towards the environment (13th) and its fair treatment of its people (14th). Its lowest ranking element relates to its contribution to reduce world poverty (17th) but is still ranked in the top twenty nations.

5.14 On the word association question for Governance from which panellists could select a single answer from a list of 8 words, the most commonly selected terms in 2010 were the same as in 2009: "trustworthy" (21%), "reliable" (21%) and "reassuring" (11%).

Culture

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

5.16 Scotland's reputation for Culture has not changed between 2009 and 2010 and it is ranked 18th by the panel nations. As with previous years, countries like UK, Canada, Australia, South Africa, Sweden and the USA are the most likely to have a stronger awareness of Scotland's culture. Alongside its smaller nation comparators, Scotland does very well in the Culture dimension and is the only one to feature in the top 20, as in 2009.

5.17 The different elements of the Culture dimension show an interesting picture. While Scotland receives one of its highest scores for cultural heritage (11th), it does not perform as well as other nations on the index for sporting excellence (26th). Most of the nations that perform well for sporting excellence on the index regularly appear in global sporting tournaments and compete as an Olympic Games team.

5.18 As in previous years, the most commonly selected words for Culture that panellists selected from a list of 10 were: "museums" (28%), "music" (24%) and "sports" (17%).

People

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

5.20 Scotland's reputation for People in 2010 is largely the same as it was in 2009, although it has moved one place from 14th to 15th. Of its smaller nation comparators, Scotland performs well and continues to rank ahead of three of these nations.

5.21 There does appear to be a difference between each element of Scotland's reputation for People. The softer element around welcoming and friendly people is ranked in the top 15 (11th), while the harder element around employability is ranked lower (17th). In saying that, the average score for the three questions within the People dimension for Scotland were in the positive range, showing this dimension as a strength for Scotland's reputation overall.

5.22 Panellists were able to select a single answer from a list of 10 to describe people from Scotland. As in 2009, the most commonly selected words were "hard-working" (26%), "honest" (24%) and "skilful" (21%).

Tourism

5.23 This dimension looks to test the kind of image a country has as a tourist destination. The survey asks panellists about: their willingness to visit (money etc being no object); a country's natural beauty, its historic landmarks and city/urban attractions.

5.24 From 2009 to 2010, Tourism remains Scotland's reputation peak across the 6 dimensions – its rank going from 13th to 12th. As with all aspects of reputation, Scotland relies on nations it has cultural and geographic links with: 7 of the panel countries rank Scotland in their top 10 for Tourism, including Germany, Sweden and Australia. Scotland's reputation for Tourism is far more prominent than its smaller nation comparators.

5.25 Most countries have a great deal of variance across their rankings on the various Tourism questions and panellists do distinguish between different aspects of Scotland's reputation for Tourism. While its natural beauty is its highest ranking score on the index (7th), Scotland's reputation for vibrant city attractions is still much lower (21st). Scotland's reputation for being rich in historic buildings and monuments is also ranked highly (11th) and the scores for Scotland across each of the questions on the Tourism dimension fall into the positive category.

5.26 There were 10 words that panellists could select from to describe what Scotland has to offer as a tourist destination. "Fascinating" (29%), "exciting" (24%), "educational" (23%) and "relaxing" (22%) were the most commonly selected.

Investment and Immigration

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

5.28 Scotland's reputation for Investment and Immigration has moved up one place from 17th in 2009 to 16th in 2010. Four nations rank Scotland in their top 10 for this dimension: UK, USA, Australia and Sweden. The other panel countries that

recognise Scotland's reputation highly are Canada (11th) and South Africa (12th). Scotland's reputation for this dimension is above two of its comparators (Ireland and Finland) and below two comparators (New Zealand and Denmark).

5.29 Again, panellists differentiate between each of the elements that make up the Immigration and Investment dimension for Scotland. Its reputation performs best as a place to live and work (13th), while the idea of investing in business in Scotland does not register as strongly (21st).²⁷

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

Summary

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

5.32 For the most part, panellists from across the world are able to distinguish between the different parts of what they perceive as Scotland's reputation. Panellists from certain nations appear more familiar with Scotland and are therefore better able to judge its strengths. In Scotland's case, English-speaking countries, European neighbours and Commonwealth nations are the most favourable and familiar with Scotland's reputation.

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

²⁷ None of Scotland's questions for Immigration and Investment were scored negatively. For instance, Scotland's reputation for investing in business was scored as a "neutral/don't know", rather than a poor reputation.

6 CONCLUSION

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

6.2 As the data source for a National Indicator on Scotland Performs, the NBISM provides a useful insight into how Scotland's reputation is perceived. With data for 2009 and 2010, the statistical assessment shows that Scotland's reputation is stable.

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

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

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

6.6 Compared to the 2009 NBISM data for Scotland, the nation's reputation is stable. The statistical assessment of change against Scotland's 2009 score for the purposes of Scotland Performs shows that Scotland's performance is maintaining.

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