

# **The Anholt-GfK Roper Nation Brands Index<sup>SM</sup>: 2018 Report for Scotland**

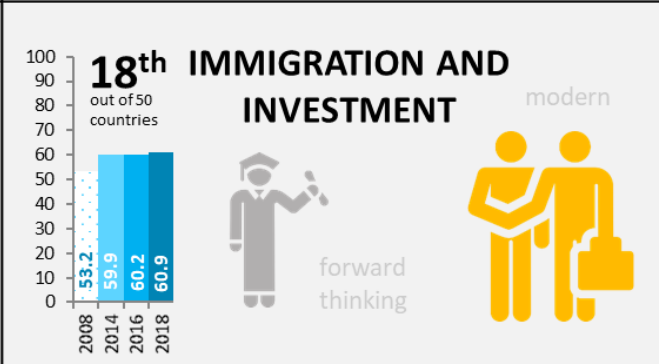
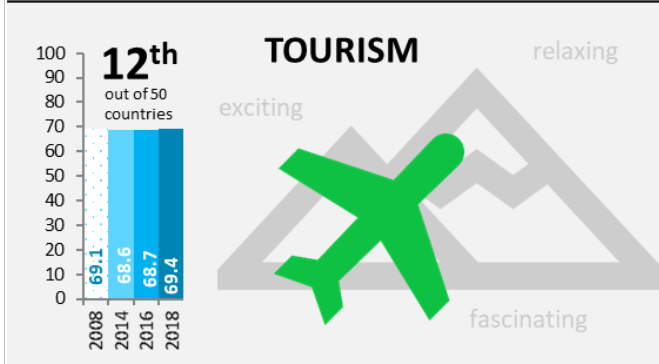
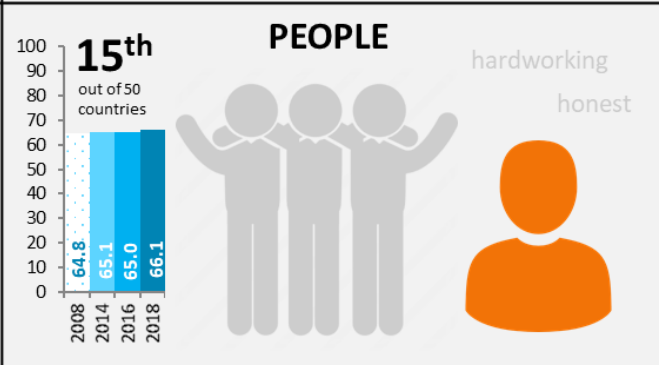
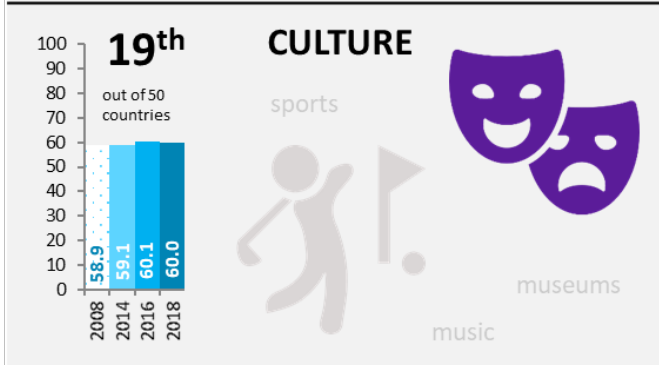
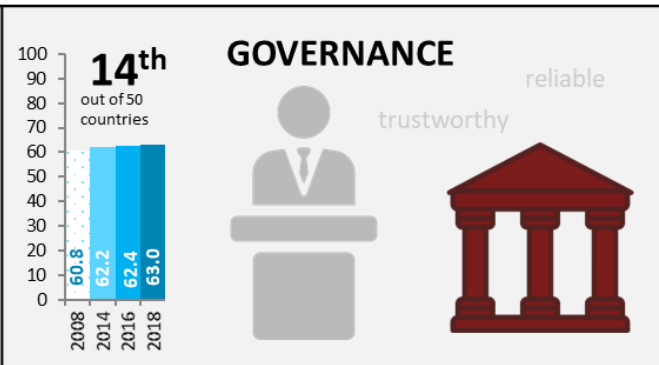
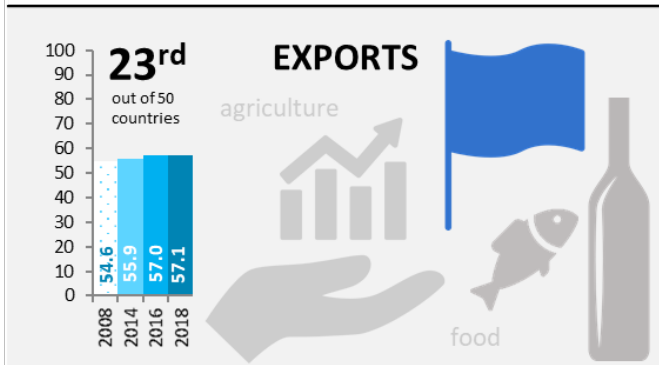
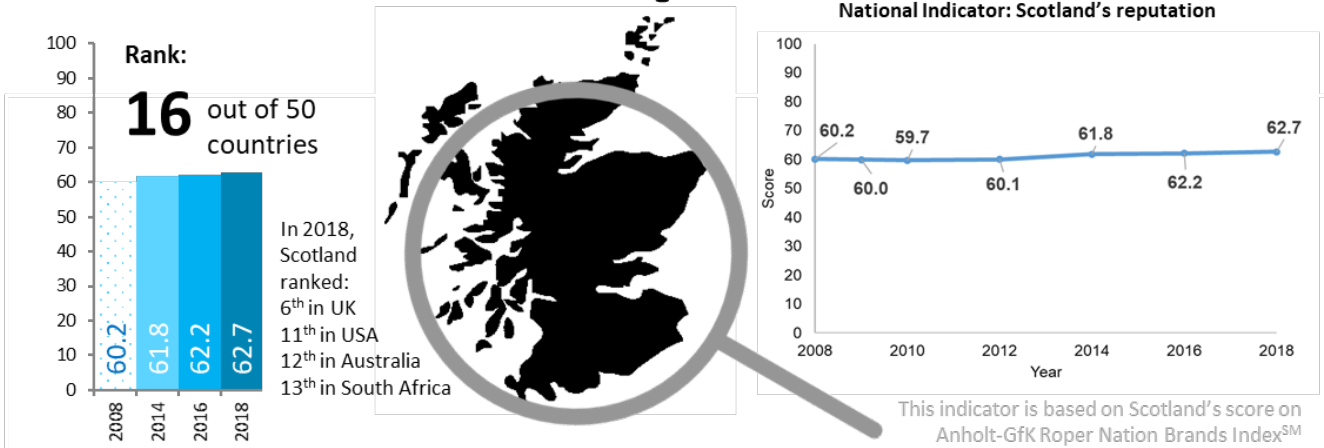
**Scottish Government Strategic Analysis**

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# Scotland's Reputation 2018



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



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# Executive summary

‘**Scotland’s reputation**’ is one of Scotland’s 81 National Performance Framework Indicators<sup>1</sup>. National Indicators enable Scotland to track progress towards the achievement of National Outcomes. The purpose is “to focus on creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing and sustainable and inclusive economic growth”<sup>1</sup>.

Since 2008, the Scottish Government has used the Anholt-GfK Roper Nation Brands Index<sup>SM</sup> (NBI<sup>SM</sup>) to assess and monitor how Scotland is perceived around the world. The NBI<sup>SM</sup> examines the image of 50 countries by looking at a country’s reputation along **six dimensions of national competence**: *Exports, Governance, Culture, People, Tourism, Immigration and Investment*. Together these provide an overall indication of a country’s reputation.

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

Scotland’s overall 2018 score of 62.7 and rank of 16<sup>th</sup> in the NBI<sup>SM</sup> show that Scotland continues to have a strong reputation abroad. This is the highest score Scotland has received since the baseline study in 2008. Whilst Scotland’s absolute score has stayed fairly stable, going from 62.2 in 2016 to 62.7 in 2018, Scotland’s relative rank has dropped by one place since 2016 (from 15<sup>th</sup> in 2016 to 16<sup>th</sup> in 2018). This is because rank may change in relation to other countries’ performance while the absolute score will not.

Generally, perceptions of Scotland were highest amongst Commonwealth and English speaking countries with the United Kingdom, Canada and the United States ranking Scotland 6<sup>th</sup>, 10<sup>th</sup> and 11<sup>th</sup> respectively. Between 2016 and 2018, Scotland’s reputation improved the most in Canada, Argentina and France.

Scotland has a strong and balanced image, and is rated as a Top 20 country on five of the six dimensions of reputation. Scotland’s strongest dimensions in 2018 were Tourism and Governance, which ranked Scotland 12<sup>th</sup> and 14<sup>th</sup> in the world, respectively. Scotland’s weakest dimension was Exports (23<sup>rd</sup>). This is Scotland’s only dimension to rank outside of the Top 20. Out of the six dimensions, People was Scotland’s most improved dimension since 2016, increasing from 65.0 to 66.1 in 2018.

Within the dimensions, Scotland fares very well in the rating of individual attributes. Natural beauty continues to be perceived as Scotland’s strongest characteristic, ranking 7<sup>th</sup> out of the 50 nations, it ranked 11<sup>th</sup> in relation to how welcoming the people of Scotland are, and

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

12<sup>th</sup> for how it protects the environment, its rich cultural heritage and its rich historic buildings and monuments.

At the start of the NBI<sup>SM</sup> survey, respondents are asked to rate how familiar and how favourable they are towards each country. Familiarity with Scotland has decreased from 63 per cent of respondents having some knowledge of Scotland in 2016 to 61 per cent in 2018. The most noticeable decrease in levels of familiarity was seen from respondents in South Korea, Brazil and Poland. Whilst favourability towards Scotland maintained between 2016 and 2018, all 20 core panel countries gave Scotland a favourability score of more than 4.0 (on a 7.0 point scale) in 2018, suggesting that Scotland is viewed comparatively positively by all panel countries.

In the 2010, 2012, 2014, 2016 and 2018 NBI<sup>SM</sup> studies, Scotland was included as an additional core panel country and as one of the 50 rated countries, and thus Scotland rated itself in each of these years. Scotland scored and ranked itself higher in 2018 than it did in 2016. In 2016, Scotland ranked itself 3<sup>rd</sup> behind Canada and the United Kingdom and gave itself a score of 67.8, while in 2018 Scotland ranked itself 1<sup>st</sup> and gave itself a score of 72.7. Furthermore, favourability in how Scotland perceived itself increased from 5.5 (on a 7.0 point scale) in 2016 to 5.9 in 2018 resulting in Scotland ranking itself 1<sup>st</sup>.

Overall, individuals in the 45 years and over and 30 to 44 years age group tended to have a more positive image of Scotland than individuals in the 18 to 29 year age group, with those aged 45 years and over having the most positive image of Scotland across five out of the six dimensions. The more exposure people have had to Scotland (through visits or contact with websites) the more likely they were to be favourable towards Scotland, and to score Scotland higher on all the dimensions. Business/executives scored Scotland higher than those in other occupations. In nearly every one of Scotland's dimensions and their underlying attributes across the survey, similar patterns are seen for these demographic groups.

While Scotland's score has increased between 2016 and 2018, the change of 0.5 is below the 1.0 point threshold for Scotland's National Indicator 'Scotland's Reputation', indicating that Scotland's reputation is 'maintaining' internationally.

# Introduction

Scotland's National Performance Framework (NPF) sets out in its purpose, values and National Outcomes, a clear, unified vision for Scotland. The purpose is "to focus on creating a more successful country with opportunities for all of Scotland to flourish through increased wellbeing and sustainable and inclusive economic growth"<sup>2</sup>.

A wide range of National Indicators (81 in total) are used to assess progress towards the purpose, values and National Outcomes. These provide a broad measure of national wellbeing, incorporating a range of economic, social and environmental indicators. One of these indicators aims to assess and monitor Scotland's reputation internationally.

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

Since 2008 the Scottish Government has used the Anholt-GfK Roper Nations Brands Index<sup>SM</sup> (NBI<sup>SM</sup>) to measure Scotland's reputation internationally. Conducted annually since 2008, the NBI<sup>SM</sup> examines the reputation of 50 countries. Each year, approximately 20,000 adults, aged 18 and over, in 20 core panel countries are interviewed online.

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

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

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

The **score**<sup>4</sup> may be regarded as a reliable indicator of a country's reputation over time.

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<sup>2</sup> [National Performance Framework](#)

<sup>3</sup> All rankings presented in the report are out of 50.

<sup>4</sup> The overall score for each of the dimensions is out of 100, while the score for each of the attributes is an average of respondents' scores, based on a scale from 1.0 to 7.0 (1.0 being the lowest and worst and 7.0 being the highest and best).

The data allow for an understanding of how Scotland is perceived by an online sample of respondents in 20 panel countries around the world, how an online sample of people from Scotland perceive Scotland itself, and how these perceptions compare with those of respondents from other countries included in the NBI<sup>SM</sup>.

While being the best available measure of Scotland's reputation for the purpose of the NPF, the NBI<sup>SM</sup> does not provide an evaluation of the Scottish Government's policies. NBI<sup>SM</sup> data should be viewed as a snapshot of people's attitudes and perceptions of Scotland which are useful in helping us to understand more about Scotland's international reputation.

Scotland subscribed to the survey in 2008, 2009 and 2010, and thereafter biennially, in 2012, 2014, 2016 and 2018. Scotland did not subscribe to the 2011, 2013 and 2017 surveys, but was included in the sample of 50 evaluated countries in these years.

The full methodology report has been published alongside this report<sup>5</sup>. This report will compare the 2018 data to the most recent previously available data in 2016, as well as previous years where relevant. Any increase or decrease mentioned in this report has not been significance tested. Annex A, within the methodology report, provides details of how the Scottish Government has adopted some aspects of the Code of Practice for Official Statistics on a voluntary basis for the Nation Brands Index<sup>SM</sup>: 2018 report for Scotland.

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<sup>5</sup> Please see the full methodology report that has been published alongside this report.

# Scotland's reputation overall

## Scotland's National Performance Framework Indicator: 'Scotland's Reputation'

The NBI<sup>SM</sup> is used to assess progress for the National Indicator '**Scotland's Reputation**'<sup>6</sup>, which is one of six National Indicators that sit under the National Outcome:



In line with the National Performance Framework guidelines, assessment of any change in Scotland's reputation is based on Scotland's absolute NBI<sup>SM</sup> score as it compares to that of the previous year. An increase of one point or more in Scotland's absolute NBI<sup>SM</sup> score suggests that the indicator is "improving", whereas a decrease of one point or more in Scotland's absolute NBI<sup>SM</sup> score suggests that the indicator is "worsening".

This report will comply with these guidelines and will only consider an increase or decrease in Scotland's absolute NBI<sup>SM</sup> score if it exceeds one point, otherwise it will treat the indicator as "maintaining".

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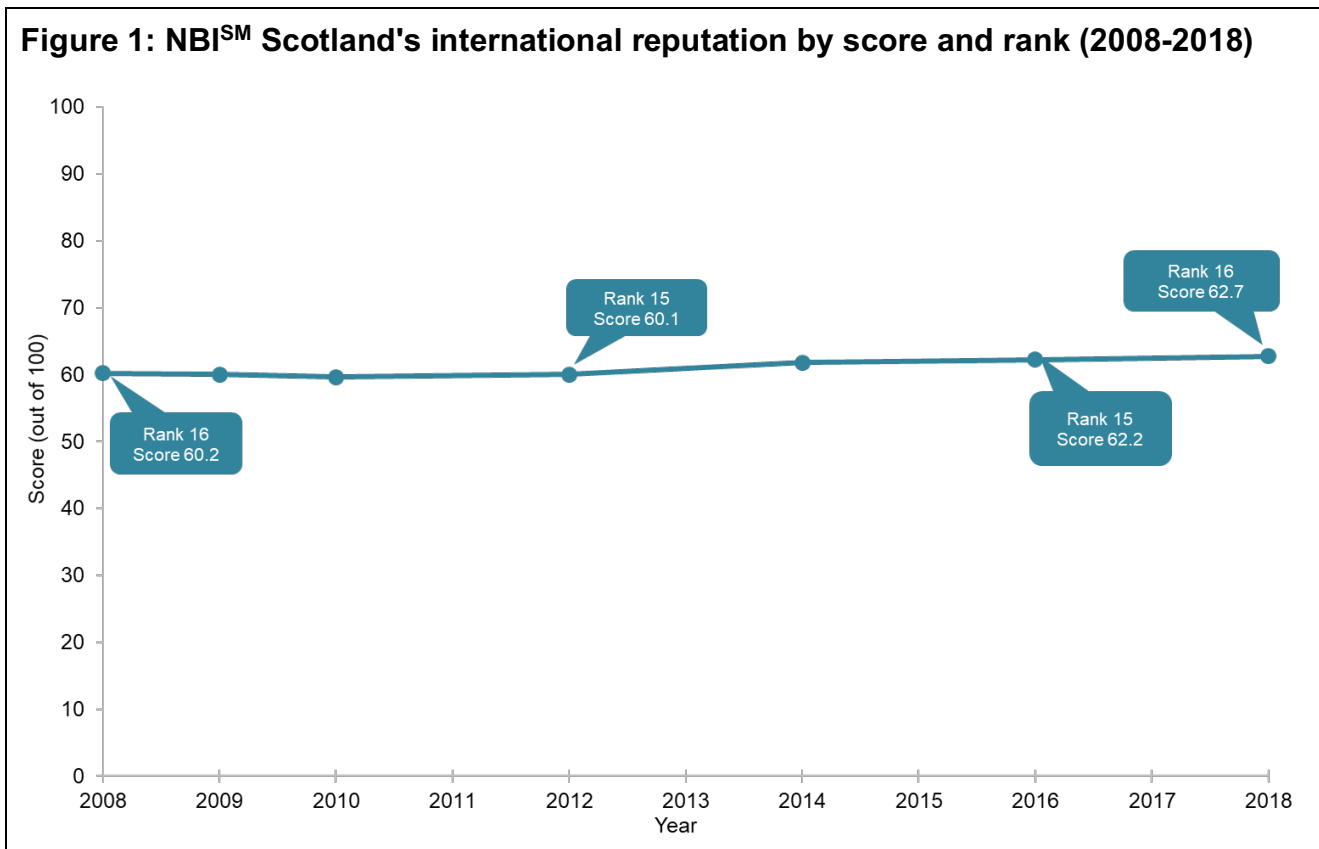
<sup>6</sup> [National Performance Framework](#)



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

Scotland's 2018 score of 62.7<sup>7</sup> and rank of 16<sup>th</sup> places Scotland in the Top 20 countries and indicates that Scotland has a high level of international recognition<sup>8</sup>. Scotland's overall reputation in terms of the NBI<sup>SM</sup> score has maintained between 2016 and 2018 (62.2 and 62.7 respectively). Figure 1 shows that, Scotland's relative rank has dropped by one place since 2016 (from 15<sup>th</sup> in 2016 to 16<sup>th</sup> in 2018). This is because rank may change in relation to other countries' performance while the absolute score will not.

Figure 1 shows that, while Scotland's reputation maintained between 2008 (when Scotland joined) and 2012, its reputation has improved since 2012.



Scotland's score of 62.7 places Scotland in the 7<sup>th</sup> decile<sup>9</sup>, far closer to the country with the top score of 69.5 than the country with the bottom score of 46.5. Countries that did better than Scotland and ranked in the Top 10 were Germany, Japan, United Kingdom, France, Canada, Italy, United States, Switzerland, Sweden and Australia.

Table 1 shows how people in different demographic groups score and rank Scotland. Notably, respondents in the 45 years or over (63.9) and 30 to 44 years age group (62.8)

<sup>7</sup> The NBI<sup>SM</sup> score is an average of the scores from the six NBI<sup>SM</sup> dimensions.

<sup>8</sup> Figures have been rounded to one decimal place.

<sup>9</sup> A decile is any of the nine values that divide the sorted data into ten equal parts, so that each part represents 1/10 of the sample or population.

tended to score Scotland's reputation higher than respondents between the ages of 18 and 29 years (61.2).

In relation to occupation, the data only allow disaggregation between business/executives and other occupations. Those in the former group tended to view Scotland more positively in terms of Scotland's reputation score (65.3) than those in other occupations (61.8). However, across the NBI<sup>SM</sup> dataset, business/executives tended to give all countries a higher score overall (on average 2.9 points higher) than those in other occupations. See Table 1.

Additionally, those who have had some exposure to Scotland, whether having visited a Scottish website (69.9) or having visited Scotland for business and/or holiday (69.6), scored Scotland's reputation higher than those with little or no exposure to Scotland. These groups also ranked Scotland more favourably. See Table 1.

**Table 1: Scotland's international reputation by age, occupation and tourism (2018)**

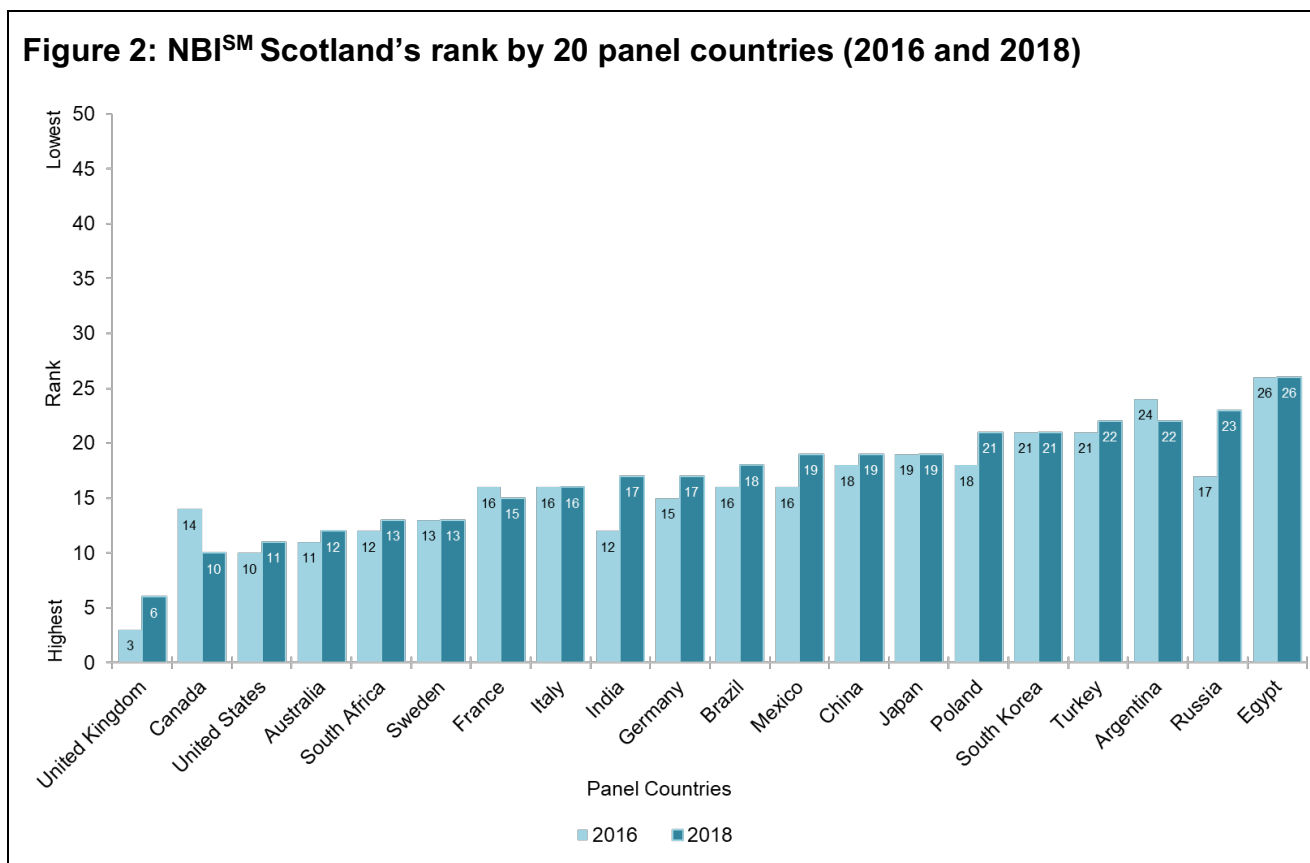
	Rank	Score
<b>Age</b>		
18-29	18	61.2
30-44	16	62.8
45+	15	63.9
<b>Occupation</b>		
Business/Executives	16	65.3
Other	16	61.8
<b>Visited Scotland</b>		
Yes	14	69.6
No	16	61.8
<b>Visited a Scottish Website</b>		
Yes	15	69.9
No	16	61.2

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

## Scotland's reputation in the 20 core panel countries<sup>10</sup>

In 2018 Scotland received its highest overall scores for reputation from Mexico (67.8), India (67.7) and South Africa (67.4). The lowest overall scores for Scotland were received from Japan (55.2), Turkey (58.3) and South Korea (58.9).

Figure 2 shows Scotland's 2018 rank by each of the 20 core panel countries, and how this compares with 2016. In 2018 the highest overall ranks for Scotland were received from the United Kingdom (6<sup>th</sup>), Canada (10<sup>th</sup>) and the United States (11<sup>th</sup>). The lowest overall ranks for Scotland were received from Egypt (26<sup>th</sup>), Russia (23<sup>rd</sup>), Turkey and Argentina (both ranking Scotland 22<sup>nd</sup>).



Scotland's score in 2018 was higher in 13 countries than it had been in 2016, most notably in Argentina and Mexico. However, Scotland's score was lower in 7 countries in 2018 than it had been in 2016, with the biggest decrease recorded by United Kingdom.

In three countries (Canada, Argentina and France) Scotland's rank was higher in 2018 than it was in 2016. Scotland's rank remained stable in five countries (Egypt, Italy, Japan, South Korea and Sweden), and was lower in 12 countries (including Russia, India, the United Kingdom<sup>11</sup>, Poland and Mexico) between 2016 and 2018. See Figure 2.

<sup>10</sup> The 20 core panel countries do not include Scotland as a panel country.

<sup>11</sup> The United Kingdom sample includes Scotland.

In several countries (Russia, Turkey, Poland, Mexico, the United States, South Africa and China) Scotland's rank was lower in 2018 compared to 2016, but the reputational scores were higher. In Canada the score was lower in 2018 but the rank was higher.

## Familiarity with Scotland

At the start of the NBI<sup>SM</sup> survey, respondents are asked to rate how familiar they are with each country. The responses provide data for familiarity with Scotland. Familiarity is presented as the percentage of respondents who had at least some knowledge of Scotland.

**Table 2: NBI<sup>SM</sup> Familiarity with Scotland (2016 and 2018)**

	Familiarity	
	Rank	Score
2016	19	63.0
2018	21	61.0

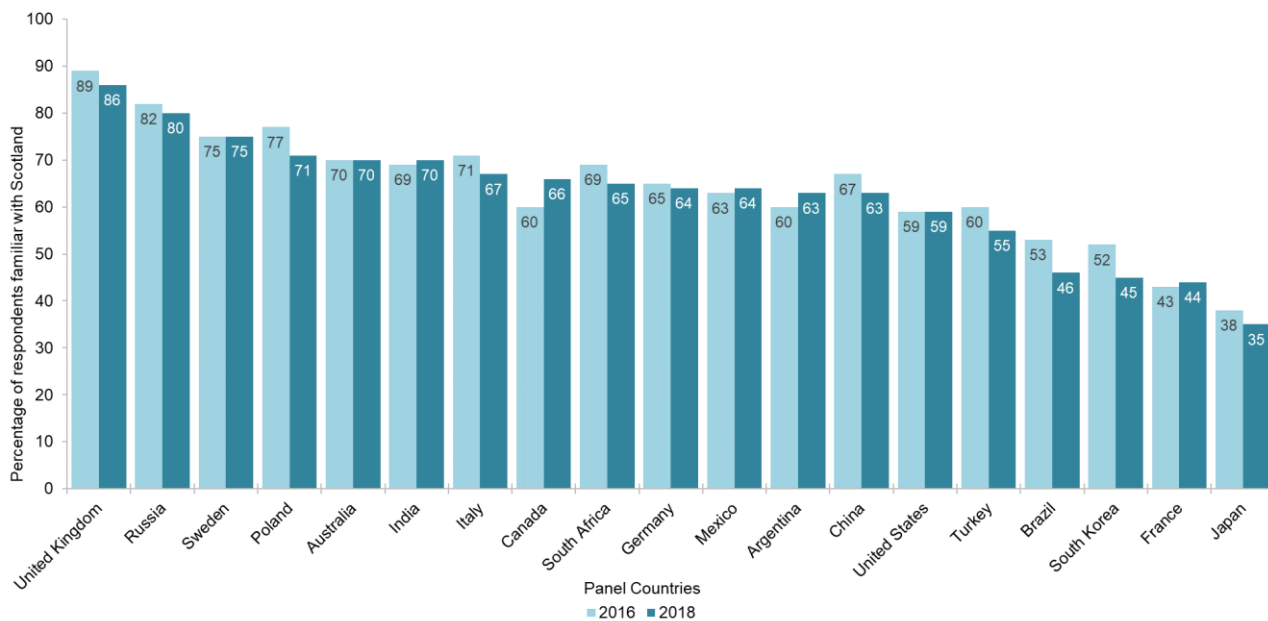
Table 2 shows that in 2018 the NBI<sup>SM</sup> panel countries were on average slightly less familiar with Scotland than the 2016 sample. Sixty one per cent of respondents reported being familiar with Scotland, resulting in a familiarity ranking of 21<sup>st</sup> out of 50. This is a decrease in both score and ranking from 2016 where 63 per cent of respondents reported being familiar with Scotland, resulting in a ranking of 19<sup>th</sup>.

### Variations between panel countries

Figure 3 shows levels of familiarity with Scotland across the 20 panel countries in 2016 and 2018. European countries tended to be the most familiar with Scotland in 2018 with 86 per cent of respondents from the United Kingdom, 80 per cent from Russia, 75 per cent from Sweden and 71 per cent from Poland having at least some knowledge of Scotland. There was one notable exception among European countries, however - France was the second least familiar with Scotland (44 per cent) in 2018.

Between 2016 and 2018, levels of familiarity with Scotland increased the most in Canada (60 per cent in 2016 to 66 per cent in 2018) and Argentina (60 per cent in 2016 to 63 per cent in 2018). Levels of familiarity decreased the most in South Korea and Brazil, dropping by seven percentage points each. See Figure 3.

**Figure 3: NBI<sup>SM</sup> Levels of familiarity with Scotland (2016 and 2018)**



Central/Eastern European countries showed the greatest familiarity with Scotland in 2018, with an average familiarity score of 68.7 per cent, followed by Western European countries (67.2 per cent) and Middle East/African countries (65.0 per cent). Scotland received its lowest familiarity score from Asia/Pacific countries (56.6 per cent).

North American countries were the only geographical region to show an increase in familiarity with Scotland between 2016 and 2018. However, this was a result of Canada being more familiar with Scotland in 2018 compared to 2016. The United States were equally familiar with Scotland in 2016 and 2018. See Figure 3. Familiarity with Scotland in the other five geographical regions decreased during this period with Central/Eastern European countries showing the greatest decrease, dropping from 73.0 percent in 2016 to 68.7 per cent in 2018.

## Favourability towards Scotland

At the start of the NBI<sup>SM</sup> survey, respondents were asked to rate how favourable they are towards Scotland on a scale of 1.0 to 7.0 (with 1.0 being extremely unfavourable and 7.0 being extremely favourable)<sup>12</sup>.

**Table 3: NBI<sup>SM</sup> Favourability towards Scotland (2016 and 2018)**

	Favourability	
	Rank	Score
2016	14	4.9
2018	16	4.9

Table 3 shows that Scotland was rated relatively highly in terms of favourability (score of 4.9 out of 7.0) with a rank of 16<sup>th</sup> out of 50 participating nations. Whilst Scotland's favourability score has maintained since 2016 its rank has dropped two places from 14<sup>th</sup> to 16<sup>th</sup>.

### Variations between panel countries

Figure 4 shows levels of favourability towards Scotland across the 20 panel countries in 2016 and 2018. None of the 20 core panel countries gave Scotland a favourability score of four (on a scale of 7.0) or less in 2018. This suggests that Scotland is viewed comparatively positively by all panel countries.

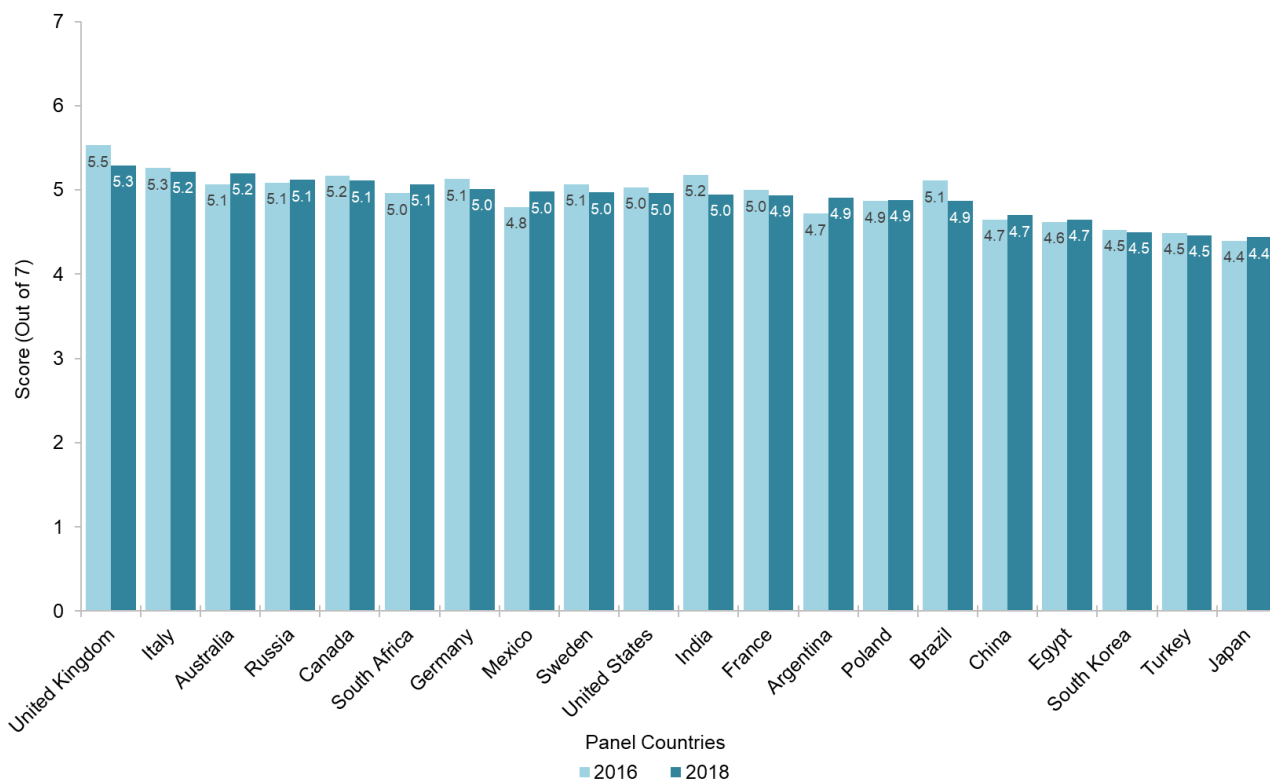
The countries that tended to be the most favourable towards Scotland in 2018, were the United Kingdom (5.3), Italy and Australia (both scoring Scotland 5.2). Japan was the least favourable towards Scotland, scoring Scotland 4.4 out of 7.0 in 2018. See Figure 4.

In 2018, the NBI<sup>SM</sup> panel countries were just as favourable towards Scotland as the 2016 sample (average favourability score of 4.9 out of 7.0 in 2016 and 2018). The greatest increase in favourability towards Scotland during this period could be found in Argentina (4.7 to 4.9), while the greatest decline in favourability towards Scotland was in the United Kingdom (5.5 to 5.3) and Brazil (5.1 to 4.9). See Figure 4.

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<sup>12</sup> An average of scores from respondents from each of the panel countries on their overall opinion of Scotland is calculated. Responses are given on a scale from 1.0 (extremely unfavourable) to 7.0 (extremely favourable) with 4.0 being neither favourable nor unfavourable.

**Figure 4: NBI<sup>SM</sup> Levels of favourability towards Scotland (2016 and 2018)**



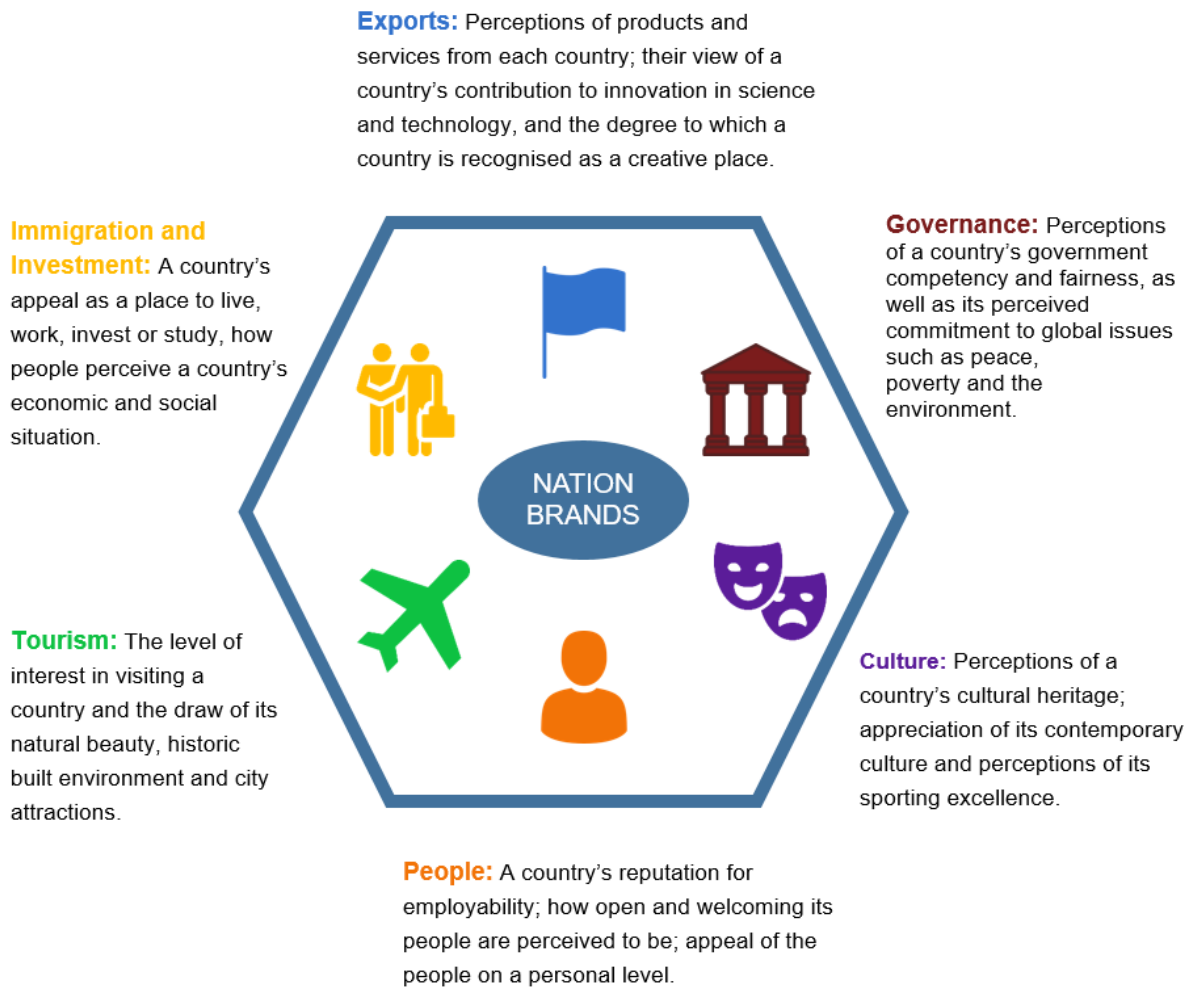
Geographical regions range in favourability from 5.1 in Western European countries, followed by North American (5.0), Latin American and Middle East/African countries (4.9) with Asia/Pacific and Central/Eastern European countries scoring Scotland 4.8 out of 7.0.

Between 2016 and 2018 there was little to no difference in geographical regions' favourability towards Scotland. Levels of favourability towards Scotland either increased by 0.1 points, decreased by 0.1 points or maintained over this period.



# Scotland's six dimensions of reputation

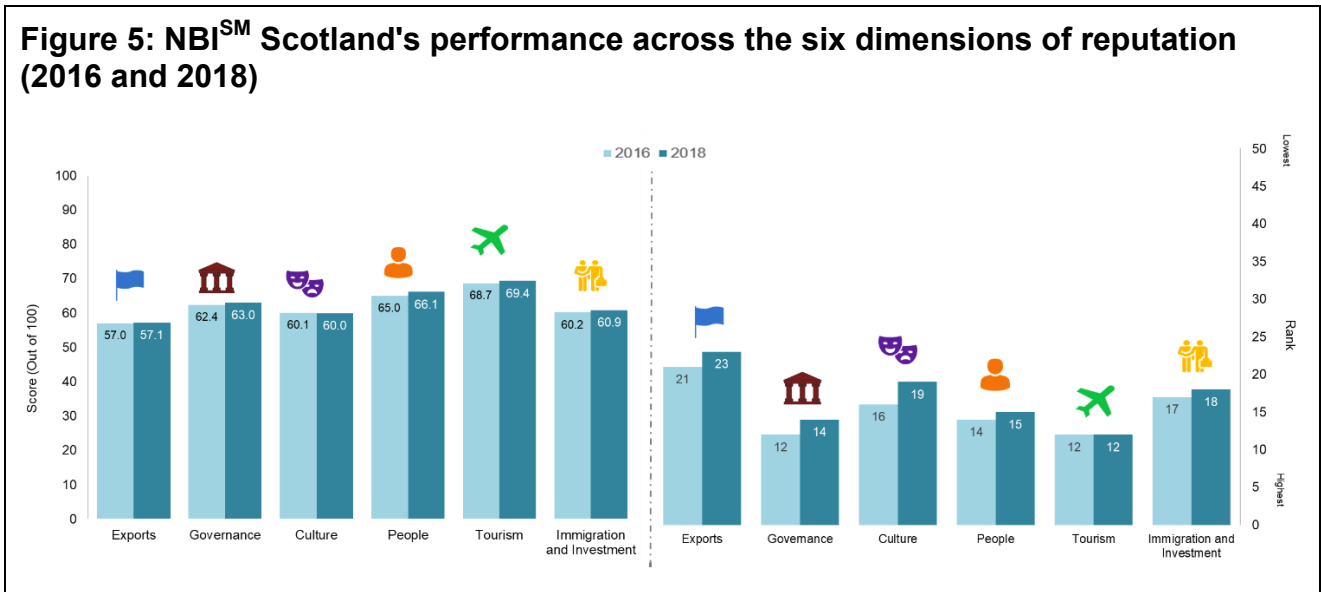
The Anholt-GfK Roper NBI<sup>SM</sup> explores a country's image by examining six dimensions of national competence, all of which are weighted equally and together to make up the NBI<sup>SM</sup> score<sup>1314</sup>. These dimensions comprise:



<sup>13</sup> The NBI<sup>SM</sup> score is an average of the scores from the six NBI<sup>SM</sup> dimensions. Each of the six dimensions is an average of the scores of the ratings questions from the dimension's attributes. There are between 3 and 5 attributes for each of the dimensions.

<sup>14</sup> For dimension calculations, the responses to each attribute are converted from its original 7 point scale to a 1-100 scale. That is done by creating a new score for each attribute. Each of the six dimensions are created, for each country, by calculating a respondent's mean of the newly transformed scores of the attributes that make up that dimension.

Figure 5 displays Scotland's 2016 and 2018 performance across the six dimensions. Overall Scotland has a strong and balanced image, and is rated as a Top 20 country on five of the six dimensions of reputation, which is comparable to the 2016 results.

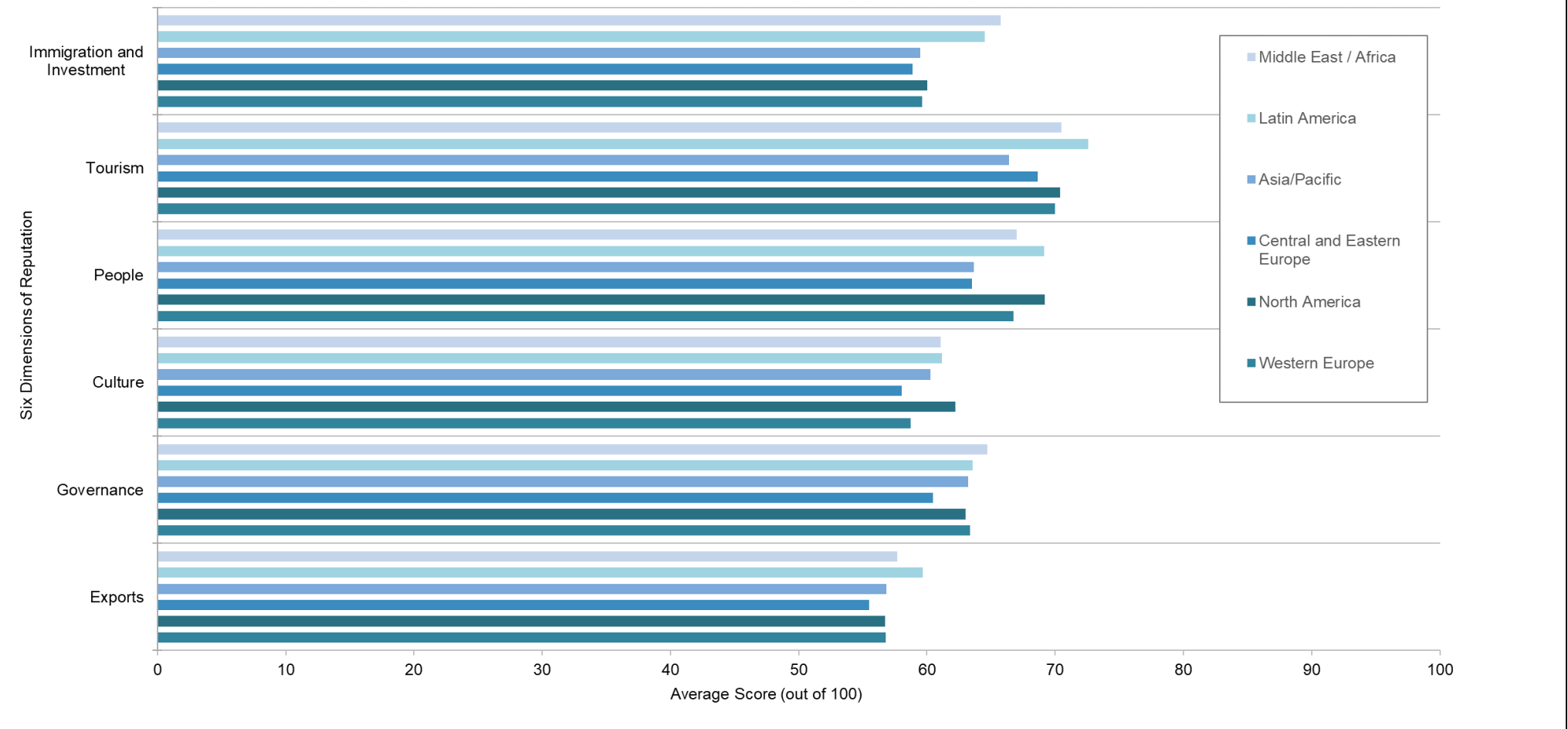


In 2018 Scotland's rank, relative to 2016, maintained on the Tourism dimension, and was lower on five of the six dimensions (Exports, Governance, Immigration and Investment and Culture). See Figure 5.

Scotland's most positive dimension in terms of rank in 2018 was Tourism, which placed Scotland 12<sup>th</sup> out of 50 countries, while Scotland's least positive dimension was Exports (23<sup>rd</sup>). Exports was Scotland's only dimension to rank outside of the Top 20. See Figure 5.

Figure 6 illustrates the difference in average scores across the six dimensions given to Scotland by the different geographic regions of the world. Latin America, on average, scored Scotland the highest (65.1) followed by the Middle East/Africa (64.5). Central/Eastern Europe scored Scotland the lowest (60.8).

**Figure 6: NBI<sup>SM</sup> Scotland's six dimensions of reputation by geographic region (2018)**



The following section investigates each of the six dimensions in turn<sup>15</sup>.

<sup>15</sup> Dimension scores are presented as a score out of 100, calculated as an average of the scores given for the underlying attributes (e.g. the Exports dimension is an average of the attributes: contribution to innovation and science, products and services and country as a creative place).

## Exports



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

**Table 4: NBI<sup>SM</sup> Scotland's reputation for Exports (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>Exports Overall</b>	21	57.0	23	57.1
Contribution to innovation and science	24	4.2	25	4.2
Products and services	18	4.5	19	4.5
Country as a creative place	20	4.5	23	4.5

Table 4 shows that Scotland received an overall score of 57.1 for the Exports dimension (57.0 in 2016). This gave Scotland a ranking of 23<sup>rd</sup> out of the 50 participating nations in 2018 (down from 21<sup>st</sup> in 2016). This is the lowest score and rank that Scotland received for any dimension.

The countries which gave Scotland the highest rankings for Exports overall were the United Kingdom (12<sup>th</sup>) and Canada (14<sup>th</sup>). The countries which gave Scotland the lowest rankings for Exports were Egypt (31<sup>st</sup>) and Brazil (25<sup>th</sup>).

### Exports attributes

The scores for attributes are based on a scale from 1.0 to 7.0 (where 1.0 is low and 7.0 is high). The scores for each of Scotland's attributes in the Exports dimension were very similar in 2018. The highest scoring attributes in the Exports dimension was products and services and country as a creative place (both receiving a score of 4.5 out of 7.0). Whilst the scores across all three attributes have remained stable between 2016 and 2018, the ranks have all decreased by at least one point<sup>16</sup>. See Table 4.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its products and services (19<sup>th</sup>). However, Scotland's contribution to innovation in science and technology, and its creativity, ranked outside the Top 20. See Table 4.

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<sup>16</sup> This is because rank is responsive to changes in the sample of countries being evaluated while absolute score is not.

## Exports word association

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

Figure 7 presents a word cloud of the products or services that were most associated with Scotland. Each of the selected words was ranked with 1 being the least chosen. The point size of each word relates to its rank, with the smallest point size representing rank 1 (least chosen), and the largest point size representing rank 10 (most chosen).

**Figure 7: Products or services most associated with Scotland (2018)**



Figure 7 shows the products or services that were most commonly associated with Scotland. These were 'Agriculture' (24 per cent) followed by 'Food' (17 per cent) and 'Crafts' (16 per cent), whilst the least commonly associated words were 'Oil' and 'Film and Television' (six per cent each)<sup>17</sup>. These proportions were all similar to those observed in 2016.

<sup>17</sup> 38 per cent of respondents also selected 'None of These'.

## Governance



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

**Table 5: NBI<sup>SM</sup> Scotland's reputation for Governance (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>Governance Overall</b>	12	62.4	14	63.0
Competent and honest	12	4.7	15	4.8
Fair and respectful of citizens' rights	12	5.0	14	5.0
International peace and security	10	4.8	14	4.8
Environmental protection	10	4.8	14	4.8
Efforts to reduce global poverty	14	4.4	14	4.4

Governance continues to be perceived as Scotland's second strongest national competency, ranked as 14<sup>th</sup> across all countries in the Index. Table 5 shows that although Scotland's score for the Governance dimension increased, from 62.4 in 2016 to 63.0 in 2018, its rank dropped two places<sup>18</sup>.

The countries which gave Scotland the highest rankings for Governance overall were Italy and South Africa (both ranking Scotland 9<sup>th</sup>). The countries which gave Scotland the lowest rankings for Governance were Egypt (27<sup>th</sup>), South Korea (20<sup>th</sup>), and China (18<sup>th</sup>).

### Governance attributes

Scotland's attribute scores for the Governance dimension ranged from 5.0 (fair and respectful of citizens' rights) to 4.4 (efforts to reduce global poverty). These scores were all similar to those observed in 2016. See Table 5.

When attribute scores were compared to other participating nations, Scotland ranked within the Top 20 for all the Governance attributes. The only attribute which did not drop in rank between 2016 and 2018 was efforts to reduce global poverty (maintained at 14<sup>th</sup>). See Table 5.

<sup>18</sup> This is because rank is responsive to changes in the sample of evaluated countries while absolute score is not.

## Governance word association

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

**Figure 8: Words associated with the government of Scotland (2018)**

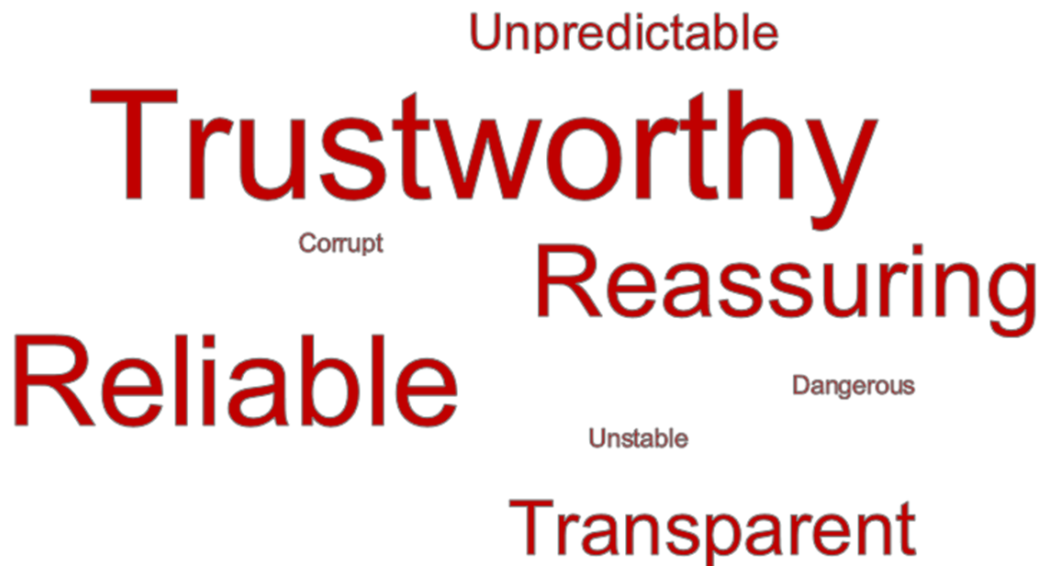


Figure 8 shows the adjectives that were most commonly used to describe Scotland's Government. These were 'Trustworthy' (23 per cent) followed by 'Reliable' (22 per cent), the least common adjectives being 'Unstable', 'Corrupt' and 'Dangerous' (two per cent each)<sup>19</sup>. These proportions were all similar to those observed in 2016.

<sup>19</sup> 20 per cent of respondents selected 'None of These'.

## Culture



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

**Table 6: NBI<sup>SM</sup> Scotland's reputation for Culture (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>Culture Overall</b>	16	60.1	19	60.0
Excellence at sports	23	4.2	29	4.1
Cultural heritage	12	5.0	12	5.0
Contemporary culture	13	4.6	17	4.6

Table 6 shows that Scotland received an overall score of 60.0 for the Culture dimension in 2018, down 0.1 points since 2016. Whilst Scotland was ranked in the Top 20 nations for Culture (19<sup>th</sup>), Scotland's rank dropped three places since 2016 (16<sup>th</sup>). See Table 6.

Scotland received its highest rank from the United Kingdom and Australia, ranking Scotland 8<sup>th</sup> and 11<sup>th</sup> respectively for Culture. The United States, Italy and Canada all ranked Scotland in the Top 15 nations. Egypt had the least favourable perception of Scotland's Cultural reputation, ranking Scotland 28<sup>th</sup> out of 50 nations.

### Culture attributes

Scotland's attribute scores for the Culture dimension ranged from 5.0 (cultural heritage) to 4.1 (excellence at sports) in 2018 and varied very little or not at all from 2016. The attribute excellence at sports was Scotland's lowest scoring and ranking attribute. See Table 6.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for its cultural heritage (12<sup>th</sup>) and contemporary culture (17<sup>th</sup>), both placing in the Top 20. However, excellence at sport ranked outside the Top 20 at 29<sup>th</sup>. See Table 6.



## Culture word association

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

**Figure 9: Cultural activities or products most expected to see produced in Scotland (2018)**



Figure 9 shows the cultural activities or products that were most commonly expected to see produced in Scotland. These were 'Museums' (27 per cent), 'Music' (20 per cent) and 'Sculptures' (17 per cent), whilst the least commonly expected cultural activities or products were 'Circus' (eight per cent) and 'Opera' (nine per cent)<sup>20</sup>. These proportions were all similar to those observed in 2016.

<sup>20</sup> 33 per cent of respondents also selected 'None of These'.

## People



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

**Table 7: NBI<sup>SM</sup> Scotland's reputation for People (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>People Overall</b>	14	65.0	15	66.1
Make you feel welcome	9	4.8	11	4.9
Friendly	13	4.9	14	4.9
Valuable employees	17	4.9	18	5.0

Table 7 shows that in 2018 Scotland received an overall score of 66.1 for the People dimension compared to a score of 65.0 in 2016, making this Scotland's most improved dimension since 2016.

Scotland continues to be highly regarded for its People, featuring in the Top 15 countries overall. Whilst Scotland has dropped a rank on the People dimension from 2016 the overall picture remains stable, with this dimension continuing to be Scotland's third strongest reputational feature.

The countries which ranked Scotland's People dimension the highest were Australia and the United States, both ranking Scotland 6<sup>th</sup>. The countries which ranked Scotland the lowest on this dimension were Egypt (30<sup>th</sup>), Russia and Brazil (both ranking Scotland 23<sup>rd</sup>).

### People attributes

Scotland's attribute scores for the People dimension were very similar in 2018 and varied very little from 2016. The highest scoring attribute in the People dimension was valuable employees (5.0). See Table 7.

When attribute scores were compared with other participating nations, Scotland ranked relatively high for all the People attributes, all of which ranked in the Top 20. See Table 7.

## People word association

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

**Figure 10: Words associated with the people of Scotland (2018)**



Figure 10 shows the adjectives that were most commonly used to describe people in Scotland. These were 'Hard Working' (29 per cent) followed by 'Honest' (24 per cent) and 'Skilful' (22 per cent), whilst the least commonly used adjectives were 'Aggressive', 'Ignorant' and 'Lazy' (four per cent each)<sup>21</sup>. These proportions were all similar to those observed in 2016.

<sup>21</sup> 26 per cent of respondents also selected 'None of These'.

## Tourism



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

**Table 8: NBI<sup>SM</sup> Scotland's reputation for Tourism (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>Tourism Overall</b>	12	68.7	12	69.4
Would visit if money were no object	13	5.2	13	5.3
Natural beauty	6	5.3	7	5.4
Historic buildings and monuments	12	5.0	12	5.1
Vibrant cities and urban attractions	20	4.8	22	4.8

Table 8 shows that Scotland's score for the Tourism dimension increased from 68.7 in 2016 to 69.4 in 2018. Tourism remains one of Scotland's key perceived strengths, ranking 12<sup>th</sup> out of the 50 participating countries in both 2018 and 2016. This is Scotland's highest scoring and ranking dimension in 2018.

The United Kingdom, Australia, Canada, Sweden, France, Germany, Italy and the United States all ranked Scotland in the Top 10 nations for Tourism, whilst Egypt (25<sup>th</sup>) and Brazil (22<sup>nd</sup>) ranked Scotland the lowest.

### Tourism attributes

Scotland's attribute scores for the Tourism dimension range from 5.4 (natural beauty) to 4.8 (vibrant cities and urban attractions) and varied very little from 2016. See Table 8.

Natural beauty continues to be perceived as Scotland's strongest characteristic, ranking 7<sup>th</sup> comparing attribute scores with other participating nations. Scotland was ranked in the Top 15 nations for the attributes: historic buildings and monuments (12<sup>th</sup>) and would visit if money were no object (13<sup>th</sup>). However, vibrant cities and urban attractions ranked outside the top 20 (22<sup>nd</sup>). See Table 8.

## Tourism word association

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

**Figure 11: Words associated with the experience of visiting Scotland (2018)**



Figure 11 shows the words that were most commonly associated with the experience of visiting Scotland. These were 'Fascinating' (30 per cent), 'Exciting' (25 per cent) and 'Educational' and 'Relaxing' (22 per cent), whilst the least commonly associated words were 'Depressing', 'Risky' and 'Stressful' (four per cent each)<sup>22</sup>. These proportions were all similar to those observed in 2016.

<sup>22</sup> 20 per cent of respondents also selected 'None of These'.

## Immigration and Investment



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

**Table 9: NBI<sup>SM</sup> Scotland's reputation for Immigration and Investment (2016 and 2018)**

	2016		2018	
	Rank	Score	Rank	Score
<b>Immigration and Investment Overall</b>	17	60.2	18	60.9
Willingness to live and work	14	4.4	14	4.5
Quality of life	16	4.9	18	5.0
Educational qualifications	15	4.6	19	4.7
Business to invest in	18	4.2	20	4.3
Equal opportunity	13	4.7	13	4.8

Table 9 shows that Scotland's score for the Immigration and Investment dimension increased from 60.2 in 2016 to 60.9 in 2018. Scotland was ranked 18<sup>th</sup> out of 50 participating nations in 2018, down 1 rank from 2016 (17<sup>th</sup>). See Table 9.

The countries which gave Scotland the highest rankings for Immigration and Investment were the United Kingdom (9<sup>th</sup>), Australia, the United States and South Africa which all ranked Scotland 11<sup>th</sup>. Similar to many of the dimensions discussed previously, Scotland received its lowest rank from Egypt (23<sup>rd</sup>) followed by Poland (21<sup>st</sup>), Russia and South Korea (both ranking Scotland 20<sup>th</sup>).

### Immigration and Investment attributes

Scotland's attribute scores for Immigration and Investment ranged from 5.0 (quality of life) to 4.3 (business to invest in). All of the Immigration and Investment attributes have increased in score by 0.1 points between 2016 and 2018. See Table 9.

When attribute scores were compared to other participating nations, Scotland ranked within the Top 20 for all of the Immigration and Investment attributes, although three attributes (quality of life, educational qualifications, business to invest in) have dropped rank since 2016. See Table 9.

## Immigration and Investment word association

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

**Figure 12: Words associated with Scotland's economic and business conditions (2018)**



Figure 12 shows the words that were most commonly associated with Scotland's economic and business conditions. These were 'Modern' (20 per cent), 'Forward Thinking' (15 per cent) and 'Developing' (14 per cent), whilst the least commonly associated words were 'Backward' (two per cent) and 'Declining' (four per cent)<sup>23</sup>. These proportions were all similar to those observed in 2016.

<sup>23</sup> 22 per cent of respondents selected 'None of These'.

# How Scotland sees itself

In the 2010, 2012, 2014, 2016 and 2018 NBI<sup>SM</sup> surveys, Scotland was included as an additional core panel country, with 500 interviews carried out in Scotland, to explore how Scotland sees itself<sup>24</sup>. Figure 13 illustrates how Scotland has scored itself since 2010.

Scotland scored and ranked itself higher in 2018 than it did in 2016. In 2016, Scotland scored itself 67.8 and ranked itself 3<sup>rd</sup> behind Canada and the United Kingdom while in 2018 Scotland gave itself a score of 72.7 and ranked itself 1<sup>st</sup>. See Figure 13.

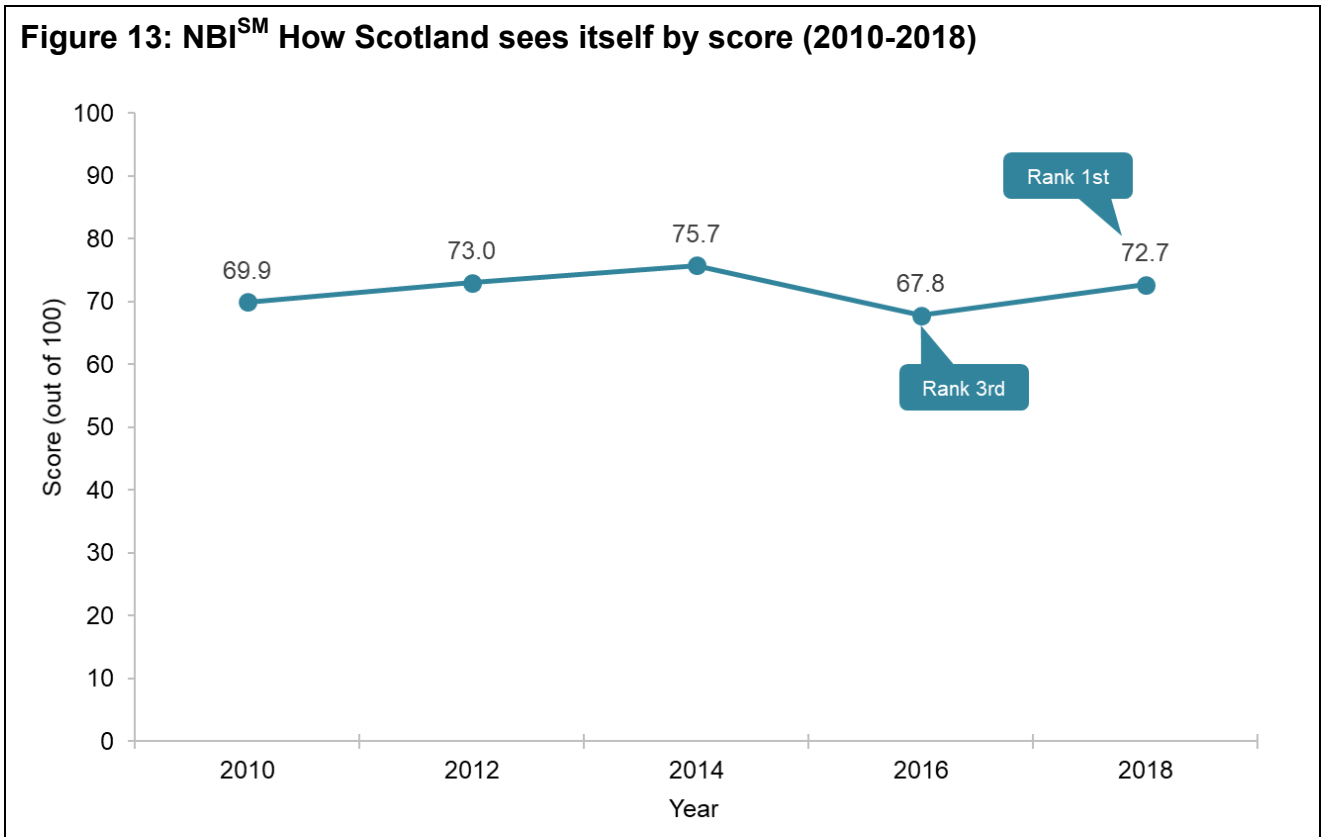
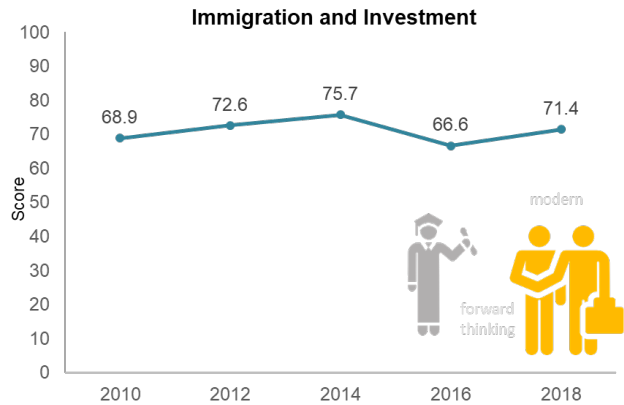
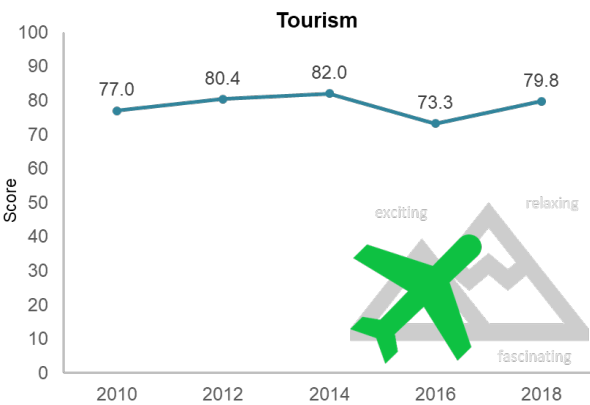
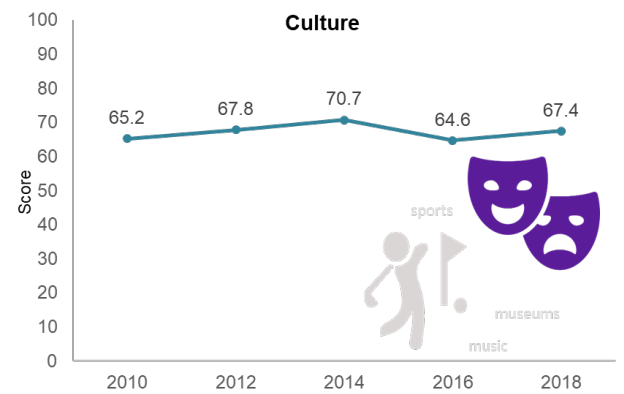
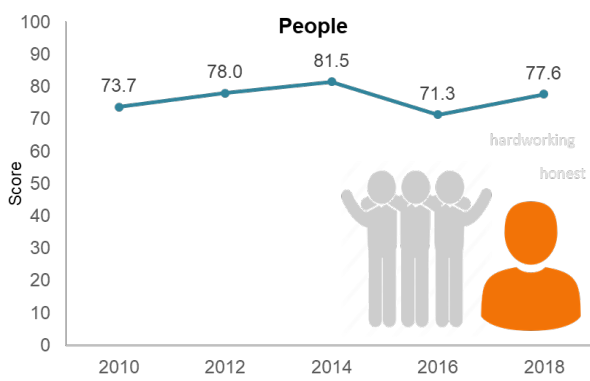
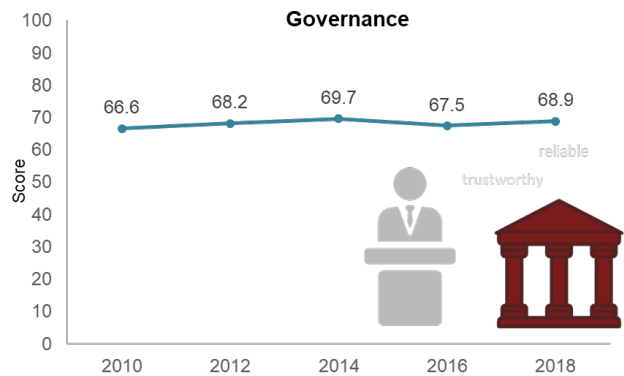
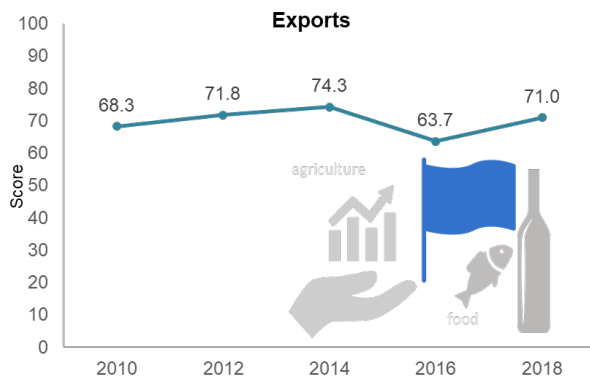


Figure 14 illustrates the score for how Scotland viewed itself across the six dimensions of reputation between 2010 and 2018. The score for how Scotland viewed itself increased each year between 2010 and 2014 across all six dimensions. This was followed by a decrease across all six dimensions between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

<sup>24</sup> The data collected from these respondents are exclusively for the Scottish Government. Therefore, this information is not shared with any other client.



**Figure 14: NBI<sup>SM</sup> How Scotland sees itself according to the six dimensions of reputation by score (2010-2018)**



In terms of rank, Scotland consistently ranked itself 1<sup>st</sup> overall between 2010 and 2014. In 2016, Scotland did not rank itself 1<sup>st</sup> on any of the six dimensions. In addition, each dimension fell by an average of three rank places. However, in 2018 Scotland ranked itself 1<sup>st</sup> overall. For individual dimensions Scotland ranked itself 1<sup>st</sup> for People, Tourism and Immigration and Investment, 2<sup>nd</sup> for Exports, 3<sup>rd</sup> for Governance and 4<sup>th</sup> for Culture. See Table 10.

**Table 10: NBI<sup>SM</sup> How Scotland sees itself according to the six dimensions of reputation by rank (2010-2018)**

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

Tables 11 and 12 show the score and rank for dimensions disaggregated by their underlying attributes. In 2018, Scotland's view of itself, in terms of score, was higher than 2016 on 20 of the 23 attributes within the dimensions. The attribute which increased the most during this period was willingness to live and work in Scotland, which increased from 5.0 in 2016 to 5.8 in 2018. Two attributes maintained over this period (fair and respectful of citizens' rights and excellence at sports) whilst one attribute (efforts to reduce global poverty), dropped by 0.1 points. See Table 11.

In terms of rank, Scotland's view of itself in 2018 was higher than in 2016 across 19 of the 23 attributes. The attribute whose rank increased the most during this period was would visit if money were no object, which increased from 8<sup>th</sup> to 1<sup>st</sup>. Three attributes stayed the same across this period and one of the attributes, excellence at sports, declined by one rank. See Table 12.

Favourability towards Scotland consistently ranked 1<sup>st</sup> between 2010 and 2014. However, in 2016, Scotland ranked itself 3<sup>rd</sup> overall behind the United Kingdom (1<sup>st</sup>) and Canada (2<sup>nd</sup>). In 2018, Scotland ranked itself 1<sup>st</sup> again on how favourable respondents were towards Scotland.

**Table 11: NBI<sup>SM</sup> How Scotland sees itself disaggregated by the 23 attributes by score (2010 – 2018)**

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

**Table 12: NBI<sup>SM</sup> How Scotland sees itself disaggregated by the 23 attributes by rank (2010 – 2018)**

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

## Conclusion

Scotland's score of 62.7 and rank of 16<sup>th</sup> on the NBI<sup>SM</sup> show that Scotland continues to have a strong reputation abroad. Countries that did better than Scotland and ranked in the Top 10 were Germany, Japan, United Kingdom, France, Canada, Italy, United States, Switzerland, Sweden and Australia.

In terms of absolute score, Scotland has improved from 62.2 in 2016 to 62.7 in 2018, an overall change of 0.5. This is the highest score Scotland has received since the baseline study of 2008. Scotland's relative rank has marginally declined overall from 2016, falling one place from 15<sup>th</sup> to 16<sup>th</sup>.

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

Figure 15 shows that when all six NBI<sup>SM</sup> dimensions of Scotland's reputation are considered Tourism, Governance and People continue to be the dimensions most recognised by the respondents from around the world. Out of the six dimensions, Scotland's score for People shows the greatest improvement from 2016.

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

While Scotland's score has increased between 2016 and 2018, the change of 0.5 is below the 1.0 point threshold for the National Indicator 'Scotland's reputation' indicating that Scotland's reputation is 'maintaining' internationally.

Figure 15: NBI<sup>SM</sup> Scotland's reputation across the 23 attributes by rank (2016 and 2018)



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

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

**Table 13: NBI<sup>SM</sup> Familiarity with Scotland by age, occupation and tourism (2018)**

	Familiarity	
	Rank	Score
<b>Age</b>		
18-29	26	57.0
30-44	23	63.0
45 +	15	62.0
<b>Occupation</b>		
Business/Executives	19	73.0
Other	21	57.0
<b>Visited Scotland</b>		
Yes	8	95.0
No	19	58.0
<b>Visited a Scottish Website</b>		
Yes	26	79.0
No	20	57.0

**Table 14: NBI<sup>SM</sup> Favourability towards Scotland by age, occupation and tourism (2018)**

	Favourability	
	Rank	Score
<b>Age</b>		
18-29	20	4.7
30-44	14	5.0
45 +	13	5.1
<b>Occupation</b>		
Business/Executives	17	5.1
Occupation Other	16	4.9
<b>Visited Scotland</b>		
Yes	8	5.7
No	16	4.8
<b>Visited a Scottish Website</b>		
Yes	15	5.3
No	15	4.8



**Table 15: NBI<sup>SM</sup> Scotland's reputation score for Exports by age, occupation and tourism (2018)**

Demographic group→ Attribute↓	Age			Occupation		Visited Scotland		Visited a Scottish Website	
	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Exports Overall</b>	56.4	57.4	57.4	59.5	56.3	64.2	56.1	64.5	55.5
Contribution to innovation and science	4.2	4.2	4.3	4.4	4.2	4.7	4.2	4.7	4.1
Products and Services	4.5	4.5	4.5	4.7	4.5	5.0	4.4	5.0	4.4
Country as a creative place	4.4	4.5	4.5	4.6	4.4	4.9	4.4	4.9	4.4

**Table 16: NBI<sup>SM</sup> Scotland's reputation rank for Exports by age, occupation and tourism (2018)**

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

**Table 17: NBI<sup>SM</sup> Scotland's reputation score for Governance by age, occupation and tourism (2018)**

Demographic group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>Governance Overall</b>	60.2	62.6	65.4	65.6	62.1	69.5	62.1	68.8	61.7	
Competent and honest	4.6	4.7	4.9	4.9	4.7	5.1	4.7	5.1	4.7	
Fair and respectful of citizens' rights	4.8	5.0	5.2	5.1	4.9	5.4	4.9	5.3	4.9	
International peace and security	4.6	4.8	5.1	5.0	4.8	5.3	4.8	5.2	4.8	
Environmental protection	4.7	4.8	4.9	4.9	4.7	5.1	4.7	5.2	4.7	
Efforts to reduce global poverty	4.4	4.4	4.5	4.6	4.4	4.8	4.4	4.8	4.4	

**Table 18: NBI<sup>SM</sup> Scotland's reputation rank for Governance by age, occupation and tourism (2018)**

Demographic group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>Governance Overall</b>	17	14	13	14	14	12	14	12	14	
Competent and honest	17	14	15	14	15	13	14	13	15	
Fair and respectful of citizens' rights	16	13	13	14	13	10	14	12	13	
International peace and security	18	12	13	13	14	10	12	9	14	
Environmental protection	14	13	11	13	13	12	12	11	14	
Efforts to reduce global poverty	15	14	13	15	15	11	14	11	15	

**Table 19: NBI<sup>SM</sup> Scotland's reputation score for Culture by age, occupation and tourism (2018)**

Demographic group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>Culture Overall</b>	58.5	60.2	61.0	62.8	59.1	66.3	59.3	66.8	58.5	
Excellence at sports	4.1	4.1	4.2	4.3	4.1	4.5	4.1	4.5	4.1	
Cultural heritage	4.9	5.1	5.2	5.2	5.0	5.5	5.0	5.4	5.0	
Contemporary culture	4.5	4.6	4.5	4.7	4.5	4.9	4.5	5.0	4.4	

**Table 20: NBI<sup>SM</sup> Scotland's reputation rank for Culture by age, occupation and tourism (2018)**

Demographic group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>Culture Overall</b>	22	18	14	16	19	21	18	16	18	
Excellence at sports	34	29	25	25	31	29	30	28	29	
Cultural heritage	14	12	12	12	12	11	12	12	12	
Contemporary culture	21	17	13	14	17	20	14	14	16	

**Table 21: NBI<sup>SM</sup> Scotland's reputation score for People by age, occupation and tourism (2018)**

Demographic group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>People Overall</b>	64.2	66.0	67.8	68.6	65.3	73.1	65.3	73.1	64.7	
Make you feel welcome	4.7	4.9	5.1	5.0	4.9	5.4	4.9	5.3	4.8	
Friendly	4.9	4.9	5.0	5.1	4.9	5.3	4.9	5.4	4.8	
Valuable employees	4.9	5.0	5.1	5.2	5.0	5.5	5.0	5.4	4.9	

**Table 22: NBI<sup>SM</sup> Scotland's reputation rank for People by age, occupation and tourism (2018)**

Demographic Group→		Age			Occupation		Visited Scotland		Visited a Scottish Website	
Attribute↓	18-29	30-44	45+	Business/Executive	Other	Yes	No	Yes	No	
<b>People Overall</b>	19	15	13	14	16	8	16	12	15	
Make you feel welcome	18	10	7	10	12	8	11	7	12	
Friendly	19	14	9	13	14	11	12	15	13	
Valuable employees	21	17	15	17	19	10	18	15	18	

**Table 23: NBI<sup>SM</sup> Scotland's reputation for Tourism by age, occupation and tourism (2018)**

Demographic group→ Attribute↓	Age			Occupation		Visited Scotland		Visited a Scottish Website	
	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Tourism Overall</b>	67.0	69.2	71.3	71.8	68.5	76.1	68.5	76.6	67.8
Would visit if money were no object	5.2	5.3	5.4	5.4	5.2	5.7	5.2	5.8	5.2
Natural beauty	5.2	5.4	5.6	5.5	5.3	5.8	5.3	5.7	5.3
Historic buildings and monuments	4.9	5.1	5.2	5.2	5.0	5.5	5.0	5.5	5.0
Vibrant cities and urban attractions	4.8	4.8	4.9	5.0	4.8	5.2	4.8	5.3	4.7

**Table 24: NBI<sup>SM</sup> Scotland's reputation rank for Tourism by age, occupation and tourism (2018)**

Demographic group→ Attribute↓	Age			Occupation		Visited Scotland		Visited a Scottish Website	
	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Tourism Overall</b>	18	12	11	12	12	10	12	10	12
Would visit if money were no object	16	15	9	13	13	9	11	12	10
Natural beauty	11	7	6	6	8	6	8	7	8
Historic buildings and monuments	15	12	12	12	12	11	12	13	12
Vibrant cities and urban attractions	27	23	17	20	21	21	20	21	20

**Table 25: NBI<sup>SM</sup> Scotland's reputation score for Immigration and Investment by age, occupation and tourism (2018)**

Demographic group→ Attribute↓	Age			Occupation		Visited Scotland		Visited a Scottish Website	
	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Immigration and Investment Overall</b>	60.5	61.2	60.4	63.4	59.7	68.3	59.6	69.7	58.7
Willingness to live and work	4.5	4.5	4.4	4.7	4.4	5.1	4.4	5.2	4.3
Quality of life	4.9	5.0	5.0	5.1	4.9	5.3	4.9	5.4	4.9
Educational qualifications	4.7	4.7	4.7	4.8	4.6	5.2	4.6	5.2	4.6
Business to invest in	4.4	4.3	4.1	4.4	4.2	4.6	4.2	4.9	4.1
Equal opportunity	4.6	4.7	4.9	4.9	4.7	5.2	4.7	5.2	4.7

**Table 26: NBI<sup>SM</sup> Scotland's reputation score for Immigration and Investment by age, occupation and tourism (2018)**

Demographic group→ Attribute↓	Age			Occupation		Visited Scotland		Visited a Scottish Website	
	18-29	30-44	45+	Business/ Executive	Other	Yes	No	Yes	No
<b>Immigration and Investment Overall</b>	19	18	17	18	18	14	18	18	18
Willingness to live and work	17	16	11	14	14	9	15	15	15
Quality of life	19	17	17	18	18	17	18	18	18
Educational qualifications	18	18	15	16	19	10	19	18	17
Business to invest in	22	19	17	21	20	26	20	24	20
Equal opportunity	18	13	13	13	13	11	13	11	15

## Further information

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