

International Research

Scotland's International Engagement: Research in China, the USA and Germany

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This paper summarises research commissioned prior to May 2007 by the Scottish Executive to support the strategy documents relating to closer engagement with China, the USA and Germany. Fieldwork was undertaken in China, the USA, Germany and Scotland and aimed to collect data on attitudes, awareness and levels of engagement and to improve understanding of the decision making of tourists, students and business people in relation to Scotland.

Main Findings

- Knowledge and awareness of Scotland was very low in China, but slightly higher in the USA and Germany.
- Perceptions of Scotland were generally positive in all three countries, but these tended to be primarily informed by traditional images of Scotland such as castles, scenery and bagpipes.
- Scotland was viewed positively as a travel destination, with potential tourists being attracted mainly by the country's historic sites, open landscapes and 'national character'.
- In both China and the USA, knowledge and awareness of Scotland as a study destination was low. However, the Fresh Talent: Working in Scotland Scheme was seen positively and has the potential to act as a draw for future students. In Germany, Scotland was seen positively as a study location and appealed particularly because of its cultural diversity and life outside study.
- Awareness of Scotland as a business location was low in China and the USA. In both countries Scotland was seen as more suitable as a place for a vacation than as a place to do business. In Germany, awareness was higher and Scotland was generally viewed positively as a business location, but with little to distinguish it from other European countries.
- In Scotland those surveyed felt they knew most about day to day life in the USA as compared to 9 other countries, including Germany and China. In relation to Germany, the young people surveyed had a good basic knowledge of Germany and the majority felt positive towards Germany.

Introduction

In 2006 and 2007 the Scottish Executive published three country-to-country engagement strategies relating to China, the USA and Germany to support its wider International Strategy. These documents are structured around a number of objectives and targets relating to trade, tourism, knowledge and understanding, and academic, business and political links¹.

The Scottish Executive's International and Europe research team commissioned research to support the development and monitoring of the three strategies in late 2006 and early 2007. The three research projects sought to provide baseline data against those strategy objectives where information was not available from other sources and to improve understanding of the decision making of tourists, students and business people in relation to Scotland.

It should be noted that since this research was commissioned a new Scottish government has been formed, which means that the research reflects commitments and strategic objectives conceived under the previous administration. The strategies, objectives and commitments referred to in this report should not therefore be treated as *current* Scottish Government policy.

Methodology

The research for each country strategy consisted of a mixture of quantitative and qualitative methods.

Research to support of the China strategy was conducted in China and Scotland. Research components in China were: semi-structured interviews with business people, university staff and overseas study agents, depth interviews with government officials and tour operators, focus groups with final year students and a survey of Chinese adults. In Scotland, a survey of the general public as well as depth interviews with Chinese students studying at Scottish universities and university staff responsible for overseas students were conducted.

Research to support the USA strategy was conducted only in the USA and involved: surveys of members of the general public and business people, focus groups with students and potential visitors and depth interviews with business people and academics.

¹ The three country strategies can be accessed via:
<http://www.scotland.gov.uk/Publications/2006/08/23080408/0> (China);
<http://www.scotland.gov.uk/Publications/2006/10/16134953/0> (USA);
<http://www.scotland.gov.uk/Publications/2007/03/26095511/0>
(Germany)

Looking at Germany, the research consisted of: a survey of young people in Scotland; a survey of the German general public; focus groups with German tourists, academics and postgraduate students; and depth interviews with German business people.

Awareness and Knowledge of Scotland abroad

Among Chinese survey respondents, knowledge of Scotland was low. Only 6% of respondents stated that they know Scotland 'very' or 'fairly' well and awareness of Scottish cities, people and products was limited. Perceptions of Scotland were generally positive and tended to be based on traditional aspects of the country such as kilts and scenery.

In the USA, basic knowledge of Scotland was relatively high. Almost two thirds of respondents correctly named Scotland as a part of the UK and 77% said they knew at least something about the country. A large majority of almost eight in ten felt favourable towards Scotland. Again, perceptions of Scotland were strongly dominated by traditional images such as bagpipes and kilts and there was very little awareness of modern aspects of the country.

In Germany, self-reported knowledge of Scotland was relatively low. Although the overwhelming majority (97%) of survey respondents had at least heard of Scotland only one in twelve (8%) said they knew it 'very well' or a 'fair amount'. 29% correctly identified Scotland's flag and just under half its capital. As in China and the USA, perceptions of Scotland were dominated by traditional images, although participants in the qualitative research were aware of some modern aspects of Scottish life.

Attracting Tourism to Scotland

In China, awareness of Scotland as a travel destination was low. Almost half the survey respondents were unable to say what makes Scotland distinctive from a travel perspective. Any associations that did exist in terms of tourism were positive and focused on traditional tourist sights such as classic architecture, castles and the landscape. Despite the lack of knowledge, a significant proportion of the Chinese research audience were interested in visiting in the future.

In the USA, 15% of survey respondents had visited Scotland in the past, most of them on vacation. Scotland was viewed positively as a travel destination, with 75% agreeing that 'it is a good place for a vacation' and 61% that it is 'a good place for a short break'. The main draws for tourists identified by the qualitative research were the rural landscapes, ancient monuments, friendly locals and golfing sites.

In Germany, 7% of people in the survey sample had visited Scotland on holiday and 16% stated that they would consider doing so in the future. The qualitative research showed that Scotland appealed particularly to older and more individualistic tourists attracted by the 'unspoilt landscapes', the 'mythic' quality of the country and the 'quirky' Scottish character. To a lesser extent there was also interest in short city trips, mainly among younger respondents.

Attracting Students to Scotland

Those participating in the qualitative research recognised the UK as a top destination. However, Chinese students, university staff and agents had a low awareness of Scotland and perceived Scottish universities to be of a lower standard compared to Oxbridge and London institutions. However, there was an expectation that the number of Chinese students coming to Scotland will increase in the future, mainly because of the Fresh Talent: Working in Scotland Scheme. Chinese students studying in Scotland also reported very positive experiences.

In the USA, knowledge of Scotland was very limited among student participants. Perceptions of Scotland were dominated by stereotypes and traditional images picked up from films and tv programmes. The country was seen positively as offering a peaceful and stress free life by some, but also negatively as boring and 'backwards' by others. Both students and academics displayed very little awareness and knowledge of Scotland as a place to study. Both groups saw the Fresh Talent: Working in Scotland Scheme as something that positively distinguished Scotland from other overseas study destinations and as something that could attract future students if better publicised.

In Germany, student and academic participants saw Scotland as an attractive location for studying abroad that compares favourably with other European countries in terms of courses offered and language skills students can acquire. It was seen to offer cultural diversity and attractive leisure activities and appealed particularly to students who wanted to obtain new experiences of living abroad. However, detailed knowledge about particular Scottish universities was limited, and it appears that decisions to study in Scotland are largely determined by whether there are established partnerships between Scottish and German universities.

Attracting Business to Scotland

In China, a survey of business representatives found that awareness of Scotland as a business location was very low, and the country was seen mainly as a place to relax and holiday rather than as somewhere to do business.

In the USA business survey, drawn from Scottish Development International's USA database of potential clients, four in ten respondents had done business with people in Scotland in the past and would be likely to visit Scotland on business in the future. At the same time, more than a third said that they know nothing about Scotland as a business location. Qualitative participants showed little awareness of Scotland as a business location and, although positive about Scotland, thought of it mainly as a vacation destination.

In Germany, awareness of Scotland as a business location was higher, with most respondents having a good understanding of the general socio-economic changes the country has undergone in recent decades. Scotland was viewed favourably as a business location but with little to distinguish it from other European countries. Business people stated that they would need more detailed information about the economic situation in Scotland as well as any bureaucratic and financial requirements or incentives to allow them to make an informed decision about whether to expand to Scotland in the future.

Knowledge of China, the USA and Germany in Scotland

A survey of Scottish adults was conducted in which respondents were asked to state how well they knew 9 countries, including China, the USA and Germany, in terms of what everyday life is like there. Self-assessed knowledge was highest for the USA (35% said they know it 'very well' or 'a fair amount'), and lower for Germany (17%) and China (8%). However, basic factual knowledge of China was relatively high, with six in ten respondents being able to identify the Chinese capital and just over half recognising the Chinese flag.

Looking at knowledge and awareness of Germany, around a quarter of young people surveyed started learning German in first year at school, making it the second most learned language at school. Recognition of the German flag and capital city was high, but was lower for more sophisticated knowledge such as knowing who the Chancellor is. Germany was generally seen positively as an open, modern, wealthy and powerful country and as a good place to visit. It was viewed favourably by half the young people surveyed. In terms of intentions, young people are most likely to visit on holiday and least likely to study or live and work in Germany.

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The reports, "Scotland's International Engagement and the China Strategy", "Scotland's International Strategy: Research to Support Scotland's Strategy for Stronger Engagement with Germany" and "USA Strategy Research Report", which are summarised in this research findings are web only documents and are available on the publications pages of the Scottish Government website at:

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