



# Pride in Scottish Brands:

## AG Barr and its iconic Irn Bru is the brand that Scots take greatest pride in

In the first wave of our nationally representative survey of over 1,000 Scottish adults from 56 Degree Insight, 'Scotland's Viewpoint', we were keen to include some questions around Scottish brands. Back in 2019, we conducted the Scottish Brands Index – an analysis of 20 Scottish brands across a range of measures from trust to 'Scottishness'. Our plans are to revisit Scottish brands in each wave of Scotland's Viewpoint, choosing a different brand evaluation measure each time. For this first wave, conducted in mid-January 2022, the focus is on 'Pride' – which Scottish brands are we most proud of?

Why is 'pride' an important element of the brand arsenal? Pride in something is an inherent feeling and brands are rapidly moving away from the traditional transactional approach to a relational journey with their users. When we are proud of something, be it ourselves, an accomplishment, a family member or a task, we tend to view that activity, person or entity through a different lens. And this can also apply to brands – to the extent that they can become part of our sense of purpose and belonging. And branding has also evolved in that it is no longer so much about a position, a value proposition or even a clear identity – it is often viewed as the compilation of a multitude of different elements that deliver on a core promise and define the output of an organisation. This often manifests itself in how we view brands – good brands often manage to enrich our lives meaning we take on the role of individual brand champions – linking ourselves to the brand with a sense of pride. make people's lives better. So it is now time to link the company brand with pride.

So, pride in brands is important from both the organisation's perspective but also from the point of view of the end consumer. But which Scottish brands instil in us a sense of pride – what does pride mean when it comes to Scotland's brands? In our research, we deliberately did not want to influence respondents by showing a set list of brands. Instead, we provided them with an open ended question which simply asked 'which Scottish brands are you most proud of?' Some mentioned as many as five brands, so the resultant responses add to more than. 100%:

## Scottish brands and organisations that we are most proud of

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**BARR** 32%

**Baxters** 3%

**Visit Scotland** 2%

**TUNNOCK'S** 11%  
MADE IN SCOTLAND SINCE 1820

**BREWDOG** 2%

**BANK OF SCOTLAND** 2%

**NHS** 7%  
SCOTLAND

**HIGHLAND SPRING** 2%

**JOHNNIE WALKER** 2%

**Walkers** 3%  
PRODUCT OF SCOTLAND  
-- ESTABLISHED 1898 --

**MACKIE'S of Scotland** 2%

**TENNENT'S** 2%

Source: Scotland's Viewpoint from 56 Degree Insight: Nationally representative survey of 1,010 Scottish adults; 14<sup>th</sup>-16<sup>th</sup> January 2022

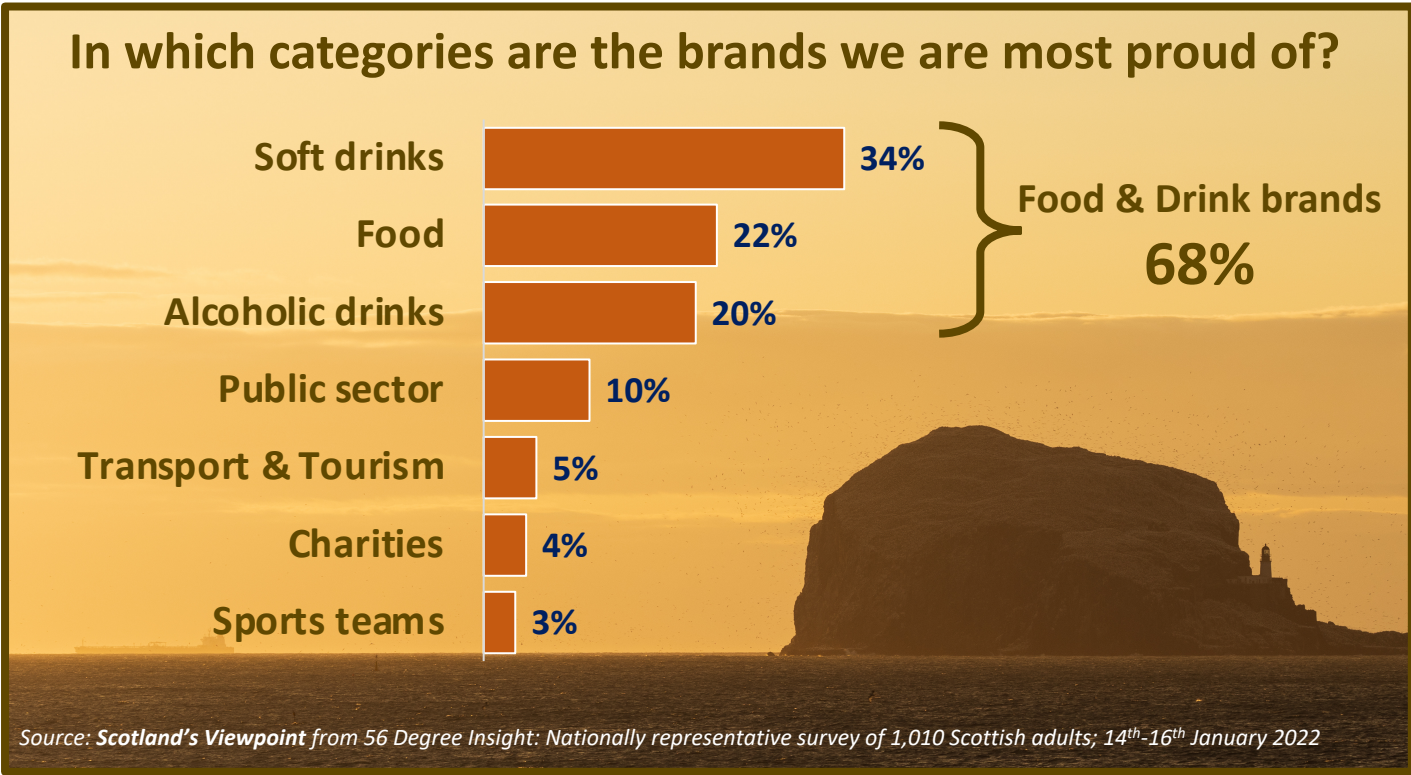


As respondents were provided with an opportunity to type in the Scottish brands they were especially proud of, without any prompting, this also illustrates the Scottish brands which are most 'front of mind' amongst the Scott population AND which are viewed with a degree of pride. One brand was mentioned by almost a third of Scots – AG Barr (often expressed based on its iconic product 'Irn Bru' (32%) – and this represents, by some distance, the Scottish brand/organisation that Scots are proud of. Second is another brand from the food and drink aisles of our supermarkets – Tunnock's: one in nine Scots mentioned this as a brand they were proud of.

Food and drink brands fill most of the positions in our Top 12 – though all of the others each mentioned by 3% or fewer, however it is notable that the most prominent 'non-consumables' brand is NHS Scotland: 7% of Scots spontaneously mentioned this as a brand/organisation they were especially proud of – undoubtedly reflecting the efforts of everyone in the NHS over the last 2 years in particular.

Clearly, when asked to think of brands, most Scots' attention naturally turns to brands they will find in the supermarket rather than brands outside of food and drink.

The graphic below groups our Scottish brands that we are most proud of into different categories and illustrates the importance of food and drink brands in the Scottish portfolio



Clearly, when interpreting the above chart, it is important to bear in mind that almost a third mentioned one 'soft drinks' brand (AG Barr) and 11% mentioned Tunnock's in the food category. Therefore, the 32% of Scots who were proud of AG Barr represents the main contributor to the soft drinks category which accounts for 34% overall.. However, although 11% selected Tunnock's, this 'only' represents half of the contribution of food brands – 22% of us are proud of brands in this category.

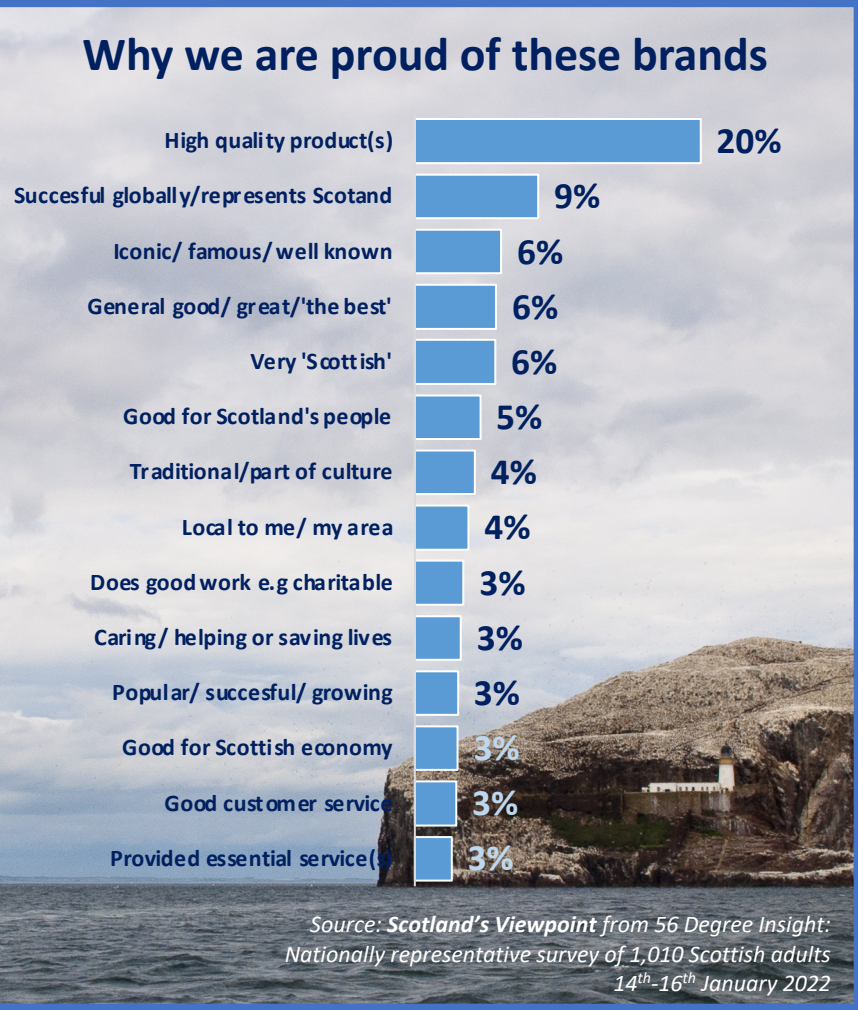
Most interesting are 'alcoholic drinks' brands – one in five of us mentioned that we were proud of brands in this category (20%) and yet no single brand accounted for more than 3% of mentions. This illustrates that the alcoholic drinks category provides a wide range of brands across whisky, beer and gin which collectively account for a significant amount of brand pride.

NHS Scotland dominates the 'public sector' category, however there were also mentions for the Scottish Government and political parties which increased this share to 10%.



So what are the reasons for the choices of Scots when it comes to the brands or organisations they are most proud of? What drives our pride in Scottish brands?

Once again, this question was asked in an open-ended format and the chart below summarises the main reasons provided across all brands as to what factors make Scots proud of their brands. In the summaries for each of the most mentioned brands, we have included verbatim responses to illustrate why specific brands were selected.




For one in five Scots, the reason they are proud of the brands they selected was because the products produced are of a high quality (20%).

And for one in eleven (9%), they were proud of the brand selected because they were successful and well known on the global stage and that they represent Scotland well abroad.

Other reasons were many and varied and relate to some products more than others as will be apparent when the results for the most popular brands are analysed. But words used to explain their choices included iconic or famous, generally good or great and the fact they were 'very Scottish' – in each case, 6% of Scots provided these reasons.

Pride in Scottish brands is just one cog in the wheel when it comes to brand evaluation, but it is an increasingly important one in this world where loyalty and personal connection are increasingly important. The iconic and traditional products produced by AG Barr and Tunnock's clearly engender a lot of pride in the population and provide aspirational targets for other Scottish brands.

In the next wave of Scotland's Viewpoint we will examine another brand metric which plays a key role – brand trust. Meantime, overleaf are summaries of brand Pride for the most popular brands.



**Scotland's Viewpoint** is a new, regular survey of 1,000 Scots – statistically representative of the Scottish adult population. It is conducted online over the course of 3 days. The first wave of the survey ran from over the weekend of 14<sup>th</sup>-17<sup>th</sup> January and future waves will be run at least quarterly. As well as some key tracking questions about Scottish public opinion, we also offer space on the survey for client-confidential polling of the Scottish population. Please get in touch with either Jim or Duncan for more information:

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## Pride in Scottish Brands:

# AG Barr



On their website, AG Barr claim they are “are a UK-based branded consumer goods business focused on growth, building great tasting brands that people love..... established over 140 years ago in Scotland and now operating across the UK and internationally, we strive to grow our business both organically and through partnerships and acquisition.”

At their heart is the Barr Soft Drinks business unit, home to a number of soft drinks brands. “Whether it’s the iconic IRN-BRU, launched in 1901 and still going strong today, our vibrant RUBICON fruit and juice drinks, or our unique range of BARR flavours, our brands offer people a choice of great tasting products and bring exciting innovation to the market. Enhancing our portfolio, we also operate long-term partnerships, complementing our own range of products with global brands SNAPPLE, SAN BENEDETTO and BUNDABERG Brewed Drinks in the UK and beyond.”



Scottish Brands most proud of:		
Position	% of Scots	Where appeal is greatest
1 <sup>st</sup>	32%	16-35 year olds: 41% Kids in household: 39% DE social classes: 37%

### Reasons why proud of AG Barr

High quality products:	34%
Iconic/famous/well known:	19%
Very Scottish:	17%
Traditional/part of culture	9%
Successful	6%
Unique	4%

### In their own words.....

*It is just 'very Scottish' and has a good heritage. It has been established since 1901 and people recognise Irn bru as Scottish all over the world*

*I think they advertise well and their product is recognisable as a good Scottish product*

*It is the most well known Scottish brand*

*Irn Bru is a national treasure*

*Because it's a very unique drink its taste is different from other drinks and you can only get it in Scotland*



Scotland's Viewpoint





## Pride in Scottish Brands:

# Tunnock's



Thomas Tunnock Limited, commonly known as Tunnock's, is a confectionary company based in Uddingston. It is headed by Boyd Tunnock, grandson of founder Thomas. In 2013, a joint report by Family Business United and Close Brothers Asset Management named it the 20th oldest family firm in Scotland.

It was formed in 1890, when Thomas Tunnock purchased a baker's shop in Uddingston. The company expanded in the 1950s, and it was at this time that the core products were introduced to the lines, when sugar and fat rationing meant that products with longer shelf-lives than cakes had to be produced.

Tunnock's most celebrated products are its Caramel Wafers, Caramel Logs and Tunnock's Teacakes.



### Scottish Brands most proud of:

Position

% of Scots

Where appeal is greatest

2<sup>nd</sup>

11%

C2 Social Classes: 15%  
Over 65 year olds: 14%  
Empty Nesters: 14%

### Reasons why proud of Tunnock's

High quality products:	47%
Globally successful:	21%
Local to me:	10%
Iconic/famous/well known:	9%
Does good charitable work:	6%
Very 'Scottish':	5%

### In their own words.....

*Family run business still based in local area but exports round the world*

*It screams Scotland*

*Local company look after employees and make significant charitable contributions*

*Family firm for 100 years . Quality products*

*Longevity of brand, quality and taste*

*Tradition and strong branding*

**Scotland's  
Viewpoint**





# Pride in Scottish Brands: NHS Scotland



The National Health Service (Scotland) Act 1947 came into effect on 5 July 1948 and created the National Health Service in Scotland. NHS Scotland currently employs approximately 140,000 staff.

NHS Scotland consists of 14 regional NHS Boards which are responsible for the protection and the improvement of their population's health and for the delivery of frontline healthcare services, 7 Special NHS Boards and 1 public health body who support the regional NHS Boards by providing a range of important specialist and national services.

Over the last two years, NHS Scotland has been at the forefront of our daily news and thinking given its role at the centre of medical care in Scotland during the COVID pandemic.



## Scottish Brands most proud of:

Position	% of Scots	Where appeal is greatest	
3 <sup>rd</sup>	7%	35-44 year olds:	9%
		55+ year olds:	9%
		ABC1s:	9%

## Reasons why proud of NHS Scotland

Caring, helping, saving lives:	23%
Provide an essential service:	18%
Hard working staff:	15%
High quality service:	15%
Good for Scotland's people:	12%
A strong, good business:	10%

## In their own words.....

*Have been through the mill during the pandemic and have put their lives at risk to save others*

*They are the best in the world*

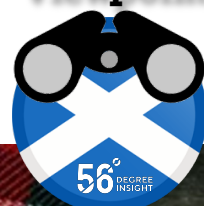
*It has been so difficult for the NHS in the last few years, but they still provide a great service, for the Scottish People.*

*I'm proud of the NHS at any time, but particularly during the COVID-19 pandemic.*

*Tremendous commitment from all within our NHS. Genuinely can't thank them enough.*



**Scotland's  
Viewpoint**





# Pride in Scottish Brands: Walkers



Joseph Walker founded the company when he opened his village bakery in Aberlour on Speyside in 1898; now it is his grandchildren and great grandchildren that continue the tradition that he started. In fact, the founder’s personal guarantee is still marked on every pack to confirm that Walker’s products are made with only the finest ingredients obtainable. Though the Walker family have added many new products to their range during the last century, each and every one holds to those original values of quality and natural goodness.



## Scottish Brands most proud of:

Position	% of Scots	Where appeal is greatest	
4 <sup>th</sup> =	3%	Those with children:	6%
		45+ year olds:	5%
		C1 social classes:	5%

## In their own words.....

*Traditional and quality*

*Delicious and people associate shortbread with Scotland*

*They are based in my town and one of the top employees for the area*

*Good quality product that is widely available*

Scotland's Viewpoint



# Pride in Scottish Brands: Baxters



Baxters was founded in 1868 by gardener George Baxter when he borrowed £100 from family members and established a grocery shop in Fochabers, Moray. His wife Margaret supported her husband by making jams and jellies using local fruits. Nowadays, Baxters of Speyside produces foods such as canned soups, canned meat products, sour pickles, sauces, vinegars, antipasti, chutneys, fruit preserves and salad and meat condiments. Products are sold under the Baxters brand as well as a variety of brands owned, or licensed, to the group (including Fray Bentos).



## Scottish Brands most proud of:

Position	% of Scots	Where appeal is greatest	
4 <sup>th</sup> =	3%	Those aged 65+:	6%
		Those aged 55-64:	5%

## In their own words.....

*Because it has remained a family business it has been able to say within the area., using local suppliers and workforce*

*Great soup and good products*

*They are based locally so benefit the local economy with job opportunities and investment in local projects. They manufacture high quality food products that are popular with consumers.*

Scotland's Viewpoint





## Pride in Scottish Brands: BrewDog



BrewDog is a multinational brewery and pub chain based in Ellon. With production of over 800,000hl, BrewDog claim to be the "#1 Craft Brewer in Europe". It was founded in 2007 by James Watt and Martin Dickie and following the success of its Punk IPA and other beers, it has extended its product portfolio to include Vodka and Gin as well as a chain of pubs across the globe.



### Scottish Brands most proud of:

Position	% of Scots	Where appeal is greatest	
6 <sup>th</sup> =	2%	Those aged 35-44:	8%
		ABC1 social classes:	4%

### In their own words.....

*It's a Scottish company that is expanding and employing people and being climate responsible.*

*Its a modern up and coming brand*

*Very popular forward thinking company*

*Totally Scottish, started by 2 young entrepreneurs and now spreading throughout the world*

### Scotland's Viewpoint



## Pride in Scottish Brands: Highland Spring



Highland Spring is a Scottish supplier of bottled water. It produces still and sparkling water at its factory in Blackford, Perth and Kinross, with its water sourced from the Ochil Hills. Highland Spring was the highest-selling sparkling water in the UK in 2008 and consolidated its first place position in the UK still water market. The company has since expanded further through organic growth[citation needed] and also by acquisition



### Scottish Brands most proud of:

Position	% of Scots	Where appeal is greatest	
6 <sup>th</sup> =	2%	Those from central Scotland:	9%
		Those aged 55+:	4%

### In their own words.....

*Leader in their field, quality product and innovative company.*

*They bottle the best water in the world*

*Lovely clear water.*

*It's a brand that's really growing outside Scotland – one to be proud of.*

### Scotland's Viewpoint

