

The Anholt – GfK Roper Nation Brands IndexSM: 2016 report for Northern Ireland

February 2017

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Northern Ireland's National Brand Image

All rankings presented are out of 50, while the overall score is indexed to 100

Rank
out of 50

21st

Score
out of 100

57.93



20th

Governance

29th

Culture



20th

Peace & Security

20th

Rights & Fairness

20th

Competent & Honest

20th

Poverty

19th

Environment

27th

Contemporary Culture

31st

Cultural Heritage

31st

Sports

22nd

People

25th

Exports



23rd

Welcoming

22nd

Close Friend

20th

Employability

26th

Science & Technology

21st

Buy Products

25th

Creative Place

20th

Immigration / Investment

28th

Tourism



20th

Quality of Life

20th

Educational Qualifications

23rd

Natural Beauty

28th

Vibrant Cities

20th

Equality in Society

20th

Work & Live

24th

Invest in Business

31st

Historic Buildings

21st

Visit if money no object

Introduction

1. It has become increasingly important to understand how Northern Ireland is viewed and thought about by other countries around the globe. Northern Ireland's international reputation will affect people's willingness to live, study, visit, do business with, and invest here, and this can have a significant impact on the economy.
2. In order to assess and monitor its international reputation, Northern Ireland has been included in the Anholt GfK-Roper Nation Brands IndexSM (NBISM) for the first time in 2016.
3. The NBISM is an analytical tool which attempts to measure and rank the broad international reputation of 50 nations, across six dimensions of national competence: Exports; Governance; Culture; People; Tourism; and Immigration and Investment.
4. The 2016 NBISM involved the completion of over 20,000 online surveys, in 20 major developed and developing panel countries, with at least 1,000 per panel country.
5. The overall NBISM score is an average of the scores from six dimensions. The score for each dimension is calculated using scores from three to five questions (attributes). Rankings are based on Northern Ireland's scores relative the other 49 participating nations.
6. **All rankings presented in the report are out of 50. The overall NBISM score and the score for each of the six dimensions are indexed to 100, while the score for each of the attributes are averaged from respondents' scores, based on a scale from 1 to 7 (with 7 being the highest and best, and 1 being the lowest and worst).**
7. More information on the methodology used, including more detail on each of the dimensions and attributes, the 50 participating nations and the 20 panel countries can be found in an accompanying methodological document, available from: <https://www.executiveoffice-ni.gov.uk/articles/equality-research-publications>.

Overall result

8. Northern Ireland was ranked 21st out of 50 nations on the 2016 NBISM, with an overall score of 57.93.
9. Although Northern Ireland is ranked 21st, its score is closer to top scoring nations than the lowest.
10. The overall rank is determined by the rankings received for the six key dimensions displayed in Figure 1. The rankings for each dimension ranged from 20th to 29th and these are discussed later in the report.

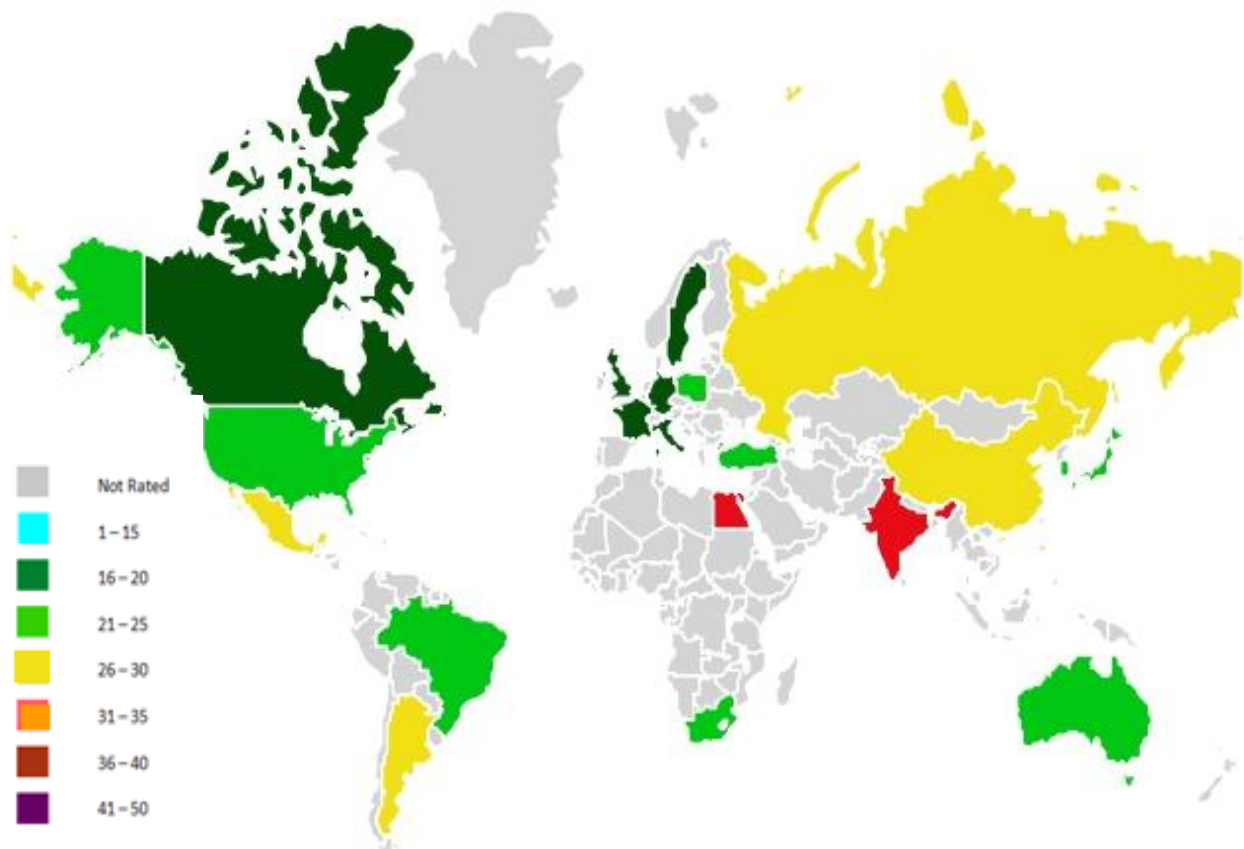
Figure 1: Northern Ireland rank across the 6 NBISM dimensions



Rankings and scores from around the globe

11. Figure 2 illustrates the overall NBISM ranking Northern Ireland received from each of the panel countries. Northern Ireland received higher overall rankings from western European and Anglo-American nations, with the highest overall ranking received from the United Kingdom (18th out of 50). Relatively high rankings were also received from Germany, France, Italy, Sweden, Canada, the United States and Australia (all of whom ranked Northern Ireland either 20th or 21st overall).
12. Lower rankings were received from countries outside of this group of western European and Anglo-American nations. Northern Ireland received its lowest rankings from India and Egypt (both 37th), with relatively low rankings also received from Russia (28th), China (29th), Mexico (27th) and Argentina (26th).
13. While rankings provide an insight into how Northern Ireland is viewed by panel countries relative to the other participating nations, the overall NBISM score provides a more absolute understanding of how Northern Ireland is viewed, both overall and by each of the individual panel countries. In this sense, it is useful to consider both rankings and scores.
14. Northern Ireland received its highest overall NBISM scores from India (62.80), Brazil (60.98) and the United Kingdom (60.41). The lowest overall NBISM scores were received from Japan (51.56), South Korea (54.98) and Sweden (55.04).
15. Northern Ireland's relatively high rank (20th) and low score (55.04) from Sweden, contrasts with the relatively low rank (37th) and high score (62.80) from India. This suggests that the distribution of scores varies across different panel countries.

Figure 2: Northern Ireland's overall NBISM ranking by core panel nation



Rankings for dimensions and attributes:

16. In terms of the six core dimensions which determine the overall score and ranking, Northern Ireland was ranked highest in relation to Governance (20th), Immigration and Investment (20th) and People (22nd). Lower rankings were evident for Exports (25th), Tourism (28th) and Culture (29th) (Table 1).
17. In terms of the 23 composite attributes, Northern Ireland was ranked relatively highly in relation to the environment (19th), the employability of its people, quality of life, as a good place to study for educational qualifications, equality, rights and fairness, somewhere to work and live, peace and security, reducing poverty, and competent and honest governance (all 20th).
18. Northern Ireland was ranked lower in relation to sporting excellence (31st), historical buildings (31st), cultural heritage (31st), and vibrant cities (28th).

Scores for dimensions and attributes:

19. Tourism was scored highest out of the six core dimensions (63.27) despite the associated low ranking (28th). Northern Ireland's People (61.89) and Governance (57.96) also received high overall scores. The lowest overall score was reported for Exports (53.76).
20. Examining the 23 composite attributes, Northern Ireland received its highest scores for natural beauty (5.05) and as somewhere respondents would like to visit if money was no object (4.82).¹ Northern Ireland scored lowest in relation to sporting excellence (3.99), having businesses that respondents would like to invest in (4.01), and its contribution to innovation in science and technology (4.04).
21. **Full details on the rankings and scores Northern Ireland received from each of the 20 panel countries can be found in Annexes 1 and 2.**

¹ Scores for the composite attributes are an average of respondents' scores to questions 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. See accompanying Methodological Document for further information: <https://www.executiveoffice-ni.gov.uk/articles/equality-research-publications>

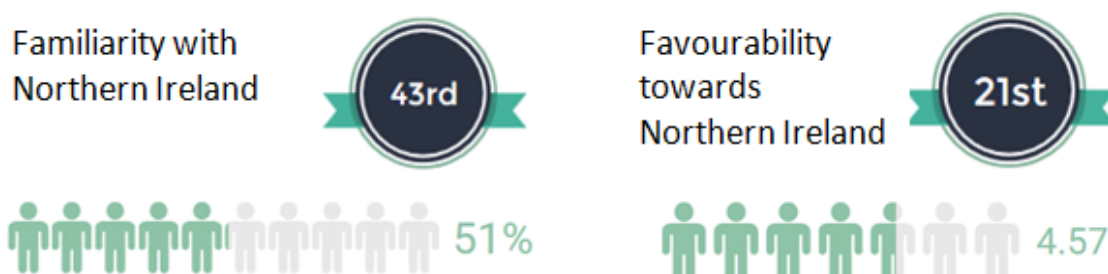
Table 1: Northern Ireland's NBISM dimension and attribute scores and rankings

Core Dimension	NBI Score (Indexed to 100)	Ranking (1-50)	Composite attributes	NBI Score (1- 7)	Ranking (1-50)
Exports	53.76	25	Science & Technology	4.04	26
			Buy products	4.28	21
			Creative Place	4.27	25
Governance	57.96	20	Competent & Honest	4.45	20
			Rights & Fairness	4.64	20
			Peace & Security	4.49	20
			Environment	4.51	19
			Poverty	4.17	20
Culture	55.47	29	Sports	3.99	31
			Cultural Heritage	4.62	31
			Contemporary Culture	4.29	27
People	61.89	22	Welcoming	4.63	23
			Close Friend	4.66	22
			Employability	4.78	20
Tourism	63.27	28	Visit if Money No Object	4.82	21
			Natural Beauty	5.05	23
			Historic Buildings	4.62	31
			Vibrant City	4.60	28
Immigration and Investment	55.25	20	Work & Live	4.07	20
			Quality of Life	4.61	20
			Educational Qualifications	4.32	20
			Invest in Business	4.01	24
			Equality in Society	4.44	20

Note: All rankings presented in the table above are out of 50. The overall score for each of the core dimensions on the NBI are indexed to 100. The score for each of the 23 attributes are averaged from respondents scores 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). Dimension scores are calculated using the scores received from each of its composite attributes.

Familiarity and Favourability

22. As part of the NBISM survey, respondents were asked to rate how aware they are of and how favourable they are towards each nation. The 'familiarity' score is presented as a percentage of respondents who had at least some knowledge of Northern Ireland, while the 'favourability' score is an average of respondents' scores based on a scale of 1 to 7.²
23. Results from the 2016 survey show that 51% of respondents reported that they had some familiarity with Northern Ireland, resulting in a 'familiarity' ranking of 43rd out of the 50 participating nations.
24. In contrast, Northern Ireland scored relatively highly in terms of favourability (score of 4.57, giving a rank of 21st out of 50 participating nations). None of the 20 panel countries scored below 4.0 (the 'neutral' score in the range from 1 to 7), suggesting that Northern Ireland is viewed positively by all panel countries.



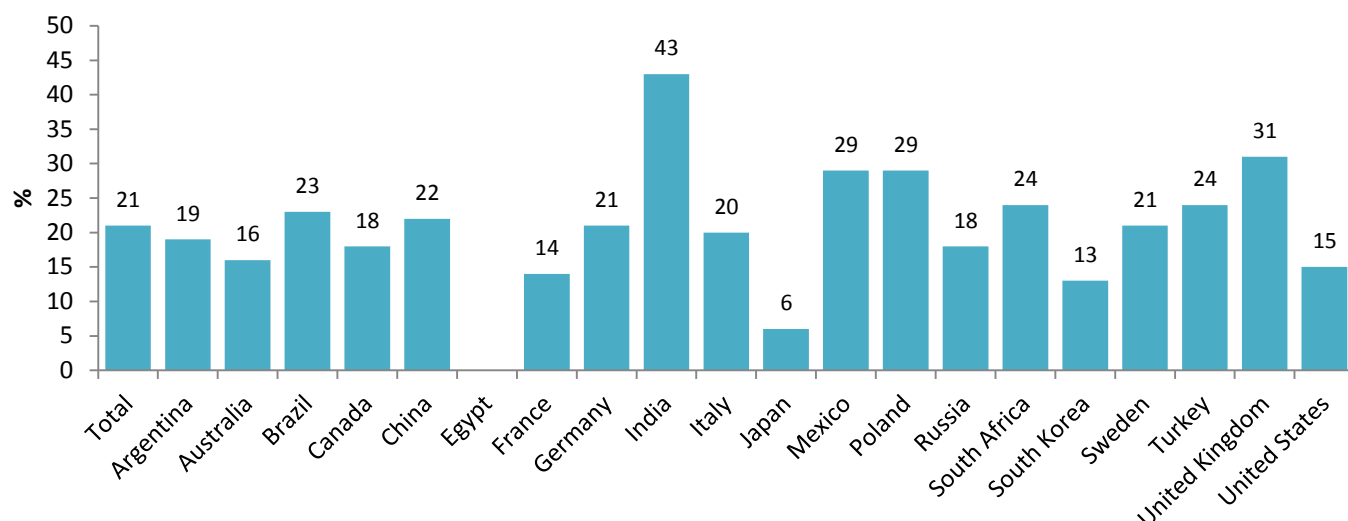
Purchased products or visited sites

25. As part of the NBISM survey, respondents were also asked if they had purchased products / services or visited websites from each nation. Results show that 8% of respondents had purchased a product from Northern Ireland (ranked 40th), while 15% of respondents reported that they had previously visited a Northern Irish website (ranked 33rd).
26. When these results were combined, Northern Ireland was ranked 41st overall in relation to the percentage of respondents who had purchased a product from Northern Ireland and / or had visited a Northern Irish website (21%).
27. Of the 20 panel countries, India (43%), the UK (31%), Mexico (29%) and Poland (29%), had the highest proportions of respondents who had purchased a product from Northern Ireland and / or had visited a Northern Irish website (Figure 3).
28. Respondents who had visited a Northern Irish website and / or had purchased a product from Northern Ireland scored Northern Ireland significantly higher in five of the six core dimensions (with the exception of Tourism) than respondents who had not.³

² 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. Please see accompanying Methodological Document for further information: <https://www.executiveoffice-ni.gov.uk/articles/equality-research-publications>

³ $p < 0.001$

Figure 3: Percentage of respondents who had purchased a product from Northern Ireland and / or visited a Northern Irish website



Note: these questions were not asked of respondents in Egypt

Proportion of the sample who had visited Northern Ireland

29. Results from the 2016 NBISM revealed that only 8% of the sample had previously visited Northern Ireland to take a vacation and / or for business purposes. This resulted in Northern Ireland ranking 38th in regards to foreign visits. Table 2 shows that a higher proportion of the sample had visited Northern Ireland for vacation (5%) than for business (3%).

30. A high proportion of respondents from the UK (28%) had visited Northern Ireland. Relatively high proportions of respondents from Italy (13%), India (11%), France (10%), Sweden (10%), and the United States (10%) had also visited Northern Ireland. In contrast, few respondents from the Latin American nations [Argentina (3%), Mexico (3%) and Brazil (4%)], or certain Asian nations [Japan (2%) and South Korea (3%)] had previously visited Northern Ireland for any reason.

Table 2: Proportion of respondents who had visited NI, by reason and panel country

	% visiting NI for business	% visiting NI for vacation	% visiting NI for any reason
Argentina	1	2	3
Australia	3	7	9
Brazil	2	2	4
Canada	2	6	8
China	3	4	8
Egypt	-	-	-
France	4	7	10
Germany	2	6	7
India	7	4	11
Italy	4	9	13
Japan	0	1	2
Mexico	1	2	3
Poland	2	6	8
Russia	1	1	2
South Africa	1	4	5
South Korea	2	1	3
Sweden	4	6	10
Turkey	3	2	5
United Kingdom	9	23	28
United States	5	5	10
Total	3	5	8

31. Respondents who had visited Northern Ireland (for any reason) scored Northern Ireland significantly higher in each of the six core dimensions than respondents who had not previously visited (Figure 4).⁴

Figure 4: Difference in scores between those who had previously visited Northern Ireland and those who had not



⁴ $p < 0.001$

Annex 1: Northern Ireland's NBISM 2016 Rankings by Panel Country

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
NBI SM rank	21	26	21	25	20	29	37	20	20	37	20	22	27	22	28	24	25	20	23	18	21
Dimension																					
Exports	25	25	25	24	23	26	34	18	21	37	21	24	26	25	29	30	26	24	25	18	22
Governance	20	18	20	19	20	21	32	18	17	34	15	22	20	21	23	20	22	20	19	16	20
Culture	29	35	26	36	25	36	38	25	24	39	23	34	38	28	28	26	33	28	25	18	26
People	22	30	15	28	20	32	40	17	18	32	20	25	29	20	29	20	25	20	20	12	20
Tourism	28	34	20	28	21	30	40	18	16	36	15	27	31	32	30	26	29	24	27	18	19
Immigration & Investment	20	24	21	19	20	24	32	19	19	34	20	22	22	22	25	21	22	20	19	18	20
Attribute																					
Ex-Science & Technology	26	29	26	26	26	29	31	23	25	36	25	25	31	29	29	31	27	26	28	22	27
Ex-Buy products	21	23	20	20	20	25	36	19	20	37	19	21	25	23	25	23	24	20	23	12	18
Ex-Creative Place	25	28	25	25	22	26	32	19	23	39	20	24	26	24	30	30	27	24	25	19	22
Gov-Competent & Honest	20	18	19	19	20	21	34	15	16	34	17	22	18	21	22	20	21	19	22	17	20
Gov-Rights & Fairness	20	19	20	19	20	23	25	18	18	34	17	23	19	21	21	19	21	20	18	18	20
Gov-Peace & Security	20	20	23	17	20	23	37	19	18	33	18	22	19	23	19	23	23	20	18	20	20
Gov- Environment	19	18	18	18	18	23	28	15	14	36	11	21	19	20	21	18	22	17	17	15	18
Gov-Poverty	20	18	20	18	20	29	36	17	16	38	19	20	22	21	20	19	23	20	27	11	20
Cul-Sports	31	34	30	36	31	35	36	26	28	36	30	28	36	25	29	28	28	28	23	21	30
Cul-Cultural Heritage	31	31	28	42	24	38	35	20	24	40	23	34	36	29	27	23	38	28	25	17	26
Cul- Contemporary Culture	27	35	23	29	22	35	40	21	20	39	22	20	35	24	26	27	33	23	24	16	24
Peo-Welcoming	23	26	20	30	20	37	37	13	16	33	19	29	28	19	32	23	27	21	24	15	19
Peo-Close Friend	22	30	13	31	19	28	39	13	17	32	17	20	29	21	29	19	22	19	22	14	20
Peo-Employability	20	26	15	26	20	30	37	18	20	33	20	25	27	19	24	23	22	20	19	8	19
Tou-Visit if Money No Object	21	30	21	24	21	25	36	17	17	37	17	26	26	29	30	25	24	20	26	20	19
Tou-Natural Beauty	23	33	17	23	19	29	34	18	18	32	14	13	30	28	21	19	21	21	17	19	18
Tou-Historic Buildings	31	33	25	32	25	36	37	26	22	42	23	33	32	25	28	23	37	34	23	17	23
Tou-Vibrant City	28	35	25	25	28	29	40	20	33	36	21	26	32	32	35	28	30	29	25	18	27
I&I-Work &Live	20	23	20	22	19	23	31	19	19	33	18	22	22	22	25	21	21	20	21	17	18
I&I-Quality of Life	20	20	21	19	20	26	30	19	19	34	20	22	20	21	23	21	22	20	19	20	20
I&I-Educational Qualifications	20	24	20	21	20	25	29	20	20	34	20	20	24	22	24	21	23	21	18	17	21
I&I-Invest in Business	24	26	22	24	23	26	35	20	20	36	22	29	27	24	31	29	26	24	26	16	20
I&I-Equality in Society	20	19	18	18	19	24	33	18	18	33	18	22	23	21	21	19	20	19	18	16	19

Note: All rankings presented are out of 50. Cells are coloured according to ranking; dark green shows the most positive rankings and dark red most negative rankings.

Annex 2: Northern Ireland's NBISM 2016 Scores by Panel Country

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
NBI SM score	57.93	56.04	57.11	60.98	58.84	59.26	57.11	57.66	59.61	62.80	58.17	51.56	60.32	58.27	57.35	59.50	54.98	55.04	56.39	60.41	57.29
Dimension																					
Exports	53.76	53.12	51.51	59.80	53.50	56.70	54.14	54.85	54.16	57.89	55.52	49.06	55.24	52.98	52.01	52.20	51.93	50.19	52.25	56.00	52.19
Governance	57.96	54.67	56.30	59.62	57.97	59.97	58.31	56.73	61.93	64.14	58.69	53.45	58.14	58.99	56.35	58.20	57.51	54.30	56.26	62.12	55.59
Culture	55.47	52.86	55.46	56.91	57.38	56.99	54.48	54.96	54.40	62.05	52.62	50.73	55.03	54.61	57.47	59.14	52.73	52.06	54.43	57.75	57.38
People	61.89	58.62	64.72	64.25	65.83	59.90	56.88	62.92	66.64	64.57	61.81	54.46	66.11	62.76	61.59	62.69	54.91	62.79	57.37	66.27	62.65
Tourism	63.27	62.71	62.55	65.14	64.77	63.23	60.73	63.04	66.08	66.26	65.11	54.78	67.53	64.42	64.85	65.76	58.58	60.72	62.50	63.42	63.24
Immigration & Investment	55.25	54.22	52.13	60.15	53.57	58.77	58.10	53.44	54.42	61.89	55.26	46.87	59.86	55.86	51.81	58.98	54.23	50.17	55.57	56.91	52.70
Attribute																					
Ex-Science & Technology	4.04	3.96	3.83	4.37	4.02	4.25	4.24	4.07	4.12	4.39	3.99	3.86	4.09	4.01	3.90	3.95	4.04	3.79	3.86	4.16	3.94
Ex-Buy Products	4.28	4.28	4.26	4.70	4.30	4.45	4.04	4.32	4.37	4.45	4.46	3.93	4.32	4.20	4.19	4.22	4.16	4.13	4.19	4.51	4.24
Ex-Creative Place	4.27	4.24	4.09	4.62	4.22	4.42	4.38	4.39	4.18	4.50	4.46	3.94	4.46	4.24	4.19	4.14	4.06	4.02	4.27	4.33	4.13
Gov-Competent & honest	4.45	4.21	4.27	4.52	4.38	4.50	4.30	4.32	4.77	4.76	4.59	4.20	4.55	4.62	4.31	4.40	4.50	4.28	4.43	4.68	4.33
Gov-Rights & Fairness	4.64	4.37	4.59	4.71	4.67	4.63	4.86	4.64	5.00	4.92	4.77	4.25	4.53	4.73	4.54	4.62	4.63	4.48	4.62	4.92	4.39
Gov-Peace & Security	4.49	4.25	4.37	4.68	4.55	4.54	4.34	4.47	4.83	4.88	4.58	4.17	4.62	4.59	4.33	4.50	4.33	4.32	4.30	4.71	4.42
Gov-Environment	4.51	4.29	4.40	4.54	4.43	4.75	4.75	4.39	4.68	4.88	4.56	4.24	4.55	4.47	4.54	4.54	4.45	4.14	4.57	4.67	4.33
Gov-Poverty	4.17	4.14	4.13	4.31	4.23	4.46	4.12	4.06	4.18	4.70	3.98	4.03	4.07	4.16	4.07	4.27	4.21	3.93	3.83	4.54	4.07
Cul-Sports	3.99	3.63	3.88	3.84	3.94	4.28	4.12	3.94	3.94	4.57	3.79	3.88	3.87	4.01	3.92	4.13	4.04	3.78	4.15	4.12	3.97
Cul-Cultural Heritage	4.62	4.58	4.79	4.80	4.96	4.50	4.35	4.67	4.61	4.80	4.49	4.19	4.61	4.51	4.85	4.99	4.25	4.45	4.34	4.79	4.90
Cul-Contemporary Culture	4.29	4.22	4.24	4.53	4.35	4.40	4.26	4.20	4.15	4.72	4.11	3.98	4.35	4.23	4.50	4.46	4.11	4.05	4.22	4.40	4.38
Peo-Welcoming	4.63	4.54	4.73	4.75	4.83	4.55	4.34	4.78	5.09	4.90	4.75	4.15	4.63	4.79	4.61	4.64	4.16	4.70	4.19	4.93	4.62
Peo-Close Friend	4.66	4.40	4.77	4.68	4.78	4.65	4.48	4.66	4.88	4.79	4.52	4.37	5.06	4.59	4.69	4.71	4.48	4.70	4.67	4.63	4.63
Peo-Employability	4.78	4.54	5.09	5.07	5.17	4.51	4.33	4.83	4.97	4.87	4.79	4.20	5.16	4.86	4.72	4.86	4.15	4.84	4.39	5.31	4.96
Tou-Visit if Money No Object	4.82	4.92	4.59	4.93	4.85	4.87	4.54	4.93	5.16	4.87	5.24	4.10	5.22	4.82	4.79	4.91	4.59	4.86	5.02	4.67	4.55
Tou-Natural Beauty	5.05	4.99	5.10	5.10	5.08	4.90	4.92	5.08	5.33	5.13	5.11	4.76	5.28	5.11	5.33	5.14	4.75	4.95	4.73	5.00	5.18
Tou-Historic Buildings	4.62	4.53	4.74	4.75	4.88	4.62	4.29	4.48	4.65	4.81	4.57	4.23	4.79	4.75	4.73	4.93	4.35	4.32	4.48	4.77	4.81
Tou-Vibrant City	4.60	4.51	4.49	4.78	4.65	4.69	4.73	4.55	4.63	5.01	4.62	3.95	4.84	4.69	4.62	4.72	4.27	4.35	4.69	4.70	4.55
I&I-Work & Live	4.07	4.01	3.75	4.37	3.79	4.43	4.36	4.07	3.73	4.61	4.33	3.43	4.51	4.01	3.74	4.44	4.28	3.67	4.00	4.04	3.80
I&I-Quality of Life	4.61	4.54	4.55	4.88	4.53	4.64	4.69	4.53	4.68	4.84	4.57	4.14	4.82	4.69	4.67	4.76	4.45	4.37	4.54	4.66	4.56
I&I-Educational Qualifications	4.32	4.30	4.16	4.72	4.41	4.41	4.34	4.23	4.32	4.55	4.32	3.81	4.59	4.27	3.96	4.53	4.21	4.06	4.41	4.56	4.24
I&I-Invest in Business	4.01	4.11	3.63	4.44	3.82	4.38	4.48	3.84	3.74	4.59	3.94	3.43	4.48	4.12	3.65	4.27	3.83	3.54	4.14	3.98	3.76
I&I-Equality in Society	4.44	4.17	4.42	4.51	4.38	4.64	4.44	4.22	4.72	4.86	4.28	4.10	4.43	4.53	4.38	4.57	4.36	4.26	4.45	4.70	4.31

Note: The overall NBISM score and the score for each of the six dimensions are indexed to 100, while the score for each of the attributes are averaged from respondents scores, 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).