

International Perceptions of Northern Ireland: Exports

Six Dimensions of the Nation Brands IndexSM 2019

March 2020

In order to assess and monitor its international reputation, Northern Ireland has been included on the Nation Brands IndexSM (NBISM) each year since 2016.

The NBISM measures and ranks the reputations of 50 nations across Six Dimensions: Exports; Governance; Culture; People; Tourism; and Immigration and Investment.

This bulletin examines Northern Ireland's reputation in relation to **Exports**. The score for the Exports dimension is calculated using scores from three attributes (see opposite). For each attribute, survey participants were presented with a statement and asked to state to what extent they agreed or disagreed on a seven point Likert scale, where one is strongly disagree, four is neither agree nor disagree, and seven is strongly agree*.

The score for the Exports dimension is out of 100, while the score for each of the attributes is based on a scale from one to seven (with seven being the highest and best, and one being the lowest and worst).

50 countries are included in the NBISM; rankings presented in the report show Northern Ireland's position among these 50 countries.

| Attribute | Statement |
|-------------------------------|--|
| Science and Technology | 'This country makes a major contribution to innovation in science and technology.' |
| Buy Products* | 'Imagine you are about to buy a product when you notice that it is made in Northern Ireland. Please indicate whether you think this would make you:.*' |
| Creative Place | 'This country is a creative place with cutting-edge ideas and new ways of thinking.' |

*In relation to the "buy products" attribute, participants were not asked to what extent they agreed or disagreed but instead asked, if they were buying a product and noticed it was made in Northern Ireland, how they would feel about buying it, on a seven point Likert scale, where one is 'feel less good about buying it' (product), four is 'feel the same about buying it' (product) and seven is 'feel better about buying it' (product).

Figure 1: Northern Ireland's ranking and score on the Exports dimension of the NBISM



Headlines

- In 2019, Northern Ireland ranked 26th of 50 for the Exports dimension (unchanged since 2018/2017 but down one place since 2016). Exports was Northern Ireland's 3rd lowest ranked dimension.
- Northern Ireland's score for Exports increased to 54.59 in 2019 (+0.49 since 2018). The Exports dimension scored higher than it has done in previous years but it remains Northern Ireland's lowest scoring dimension.
- Exports received significantly higher scores from those who had visited Northern Ireland than those who had not.
- When asked to what extent they agreed or disagreed with attribute statements, large proportions of respondents (more than 49%) felt neutral about all three attribute statements for the Exports dimension.
- In 2019, the largest changes in rank were from China, who ranked Northern Ireland five places higher, and India and Turkey, who ranked Northern Ireland five places lower than in 2018.

Rankings and scores on the Exports dimension from around the world

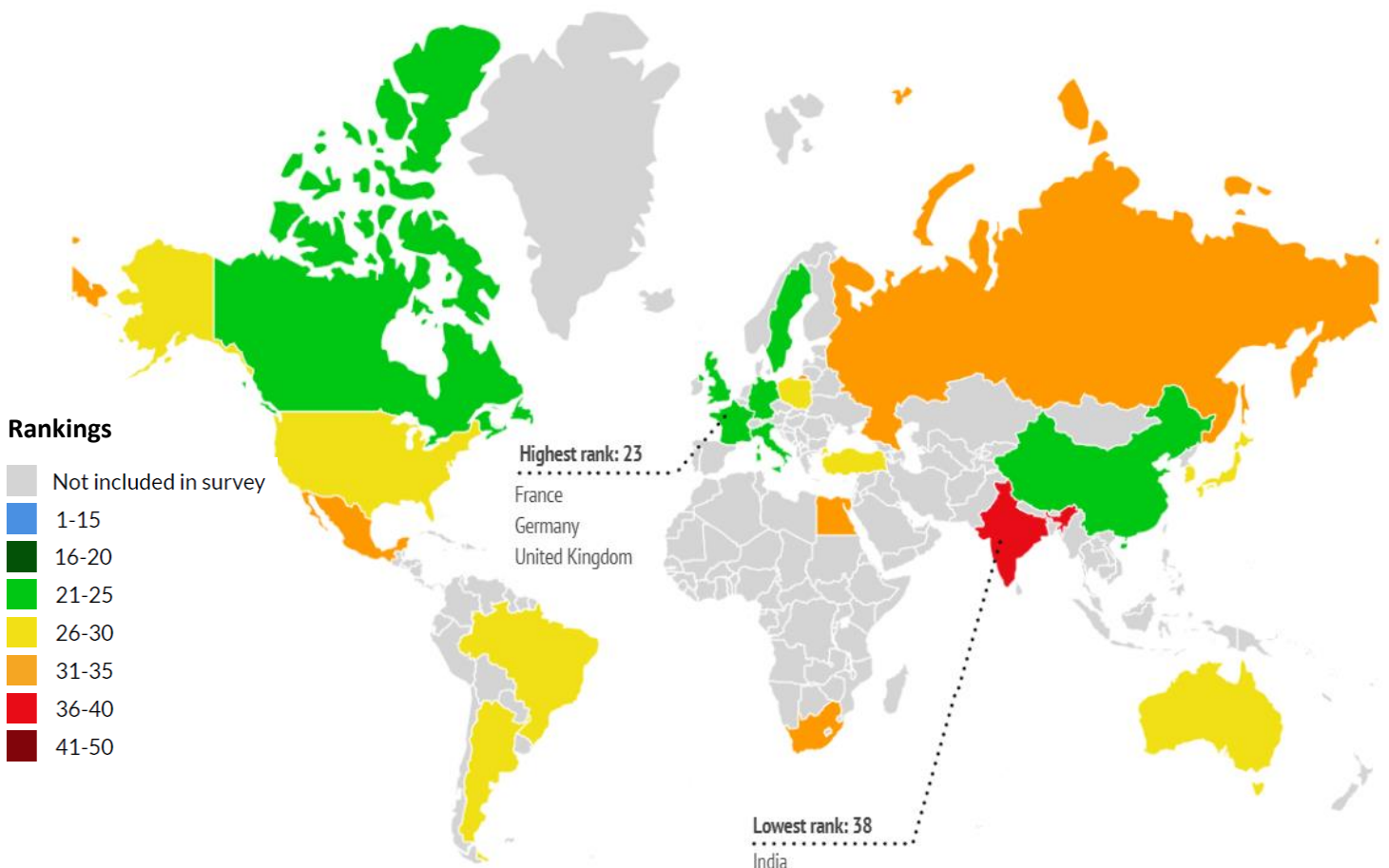
Northern Ireland received a range of rankings on the Exports dimension (Figure 2). While the overall Exports ranking remained the same between 2018 and 2019, 7 of 20 panel countries ranked Northern Ireland lower for this dimension in 2019 than they had in 2018. The highest rankings were received from the United Kingdom, France and Germany (each ranked Northern Ireland 23rd). Northern Ireland's lowest rankings were received from India (38th) and Egypt (35th).

While rankings provide an insight into how Northern Ireland is viewed by panel countries relative to the other participating nations, they can be impacted year on year due to the inclusion of new countries in the survey. The dimension 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.

Northern Ireland's score on the Exports dimension was higher in 2019 than in 2018. The highest score was received from India (63.98) with a relatively high score also received from China (60.97) in 2019. Northern Ireland's lowest score was received from Japan (48.97), with relatively low scores also received from South Korea (50.47), Sweden (50.73) and Australia (50.77).

Northern Ireland received a relatively high rank (25th) but low score (50.73) from Sweden, which contrasts with the low rank (38th) but high score (63.98) received from India. This suggests that scores from different panel countries are not necessarily comparable, again, highlighting the importance of considering both score and rank when evaluating responses from other countries.

Figure 2: Northern Ireland's rankings on the Exports dimension from around the world



Attribute scores and rankings

The score for each attribute is an average of participants' scores, on a scale from one (lowest and worst) to seven (highest and best) with four being neither positive nor negative.

Northern Ireland's attribute scores on the Exports dimension have been positive (i.e. above the neutral value of 4) each year since Northern Ireland was included in 2016. All three attribute scores increased slightly from 2018. The highest scoring Exports attributes in 2019 were "buy products" and "creative place" (both 4.33).

When attribute scores for Exports were compared with the other participating nations, Northern Ireland was ranked between 23rd and 28th out of the 50 nations examined.

Figure 3: Rankings and scores for Northern Ireland's Exports attributes

| SCORE | ATTRIBUTE | RANK |
|-------|--|------|
| 4.08 | Science & Technology  | 28 |
| 4.33 | Buy Products  | 23 |
| 4.33 | Creative Place  | 26 |

Note: Attribute scores range from 1 to 7 and all rankings are out of 50.

Differences between those who have visited Northern Ireland and those who have not

In 2019, ten per cent of NBISM participants reported that they had previously visited Northern Ireland.

Participants who had previously visited the region scored Northern Ireland statistically significantly* higher on the Exports dimension, as well as on each of the composite attributes, than those who had not visited (Figures 4 and 5). This pattern was also evident in all previous survey years.

Figure 4: Exports dimension scores – those who have visited Northern Ireland and those who have not

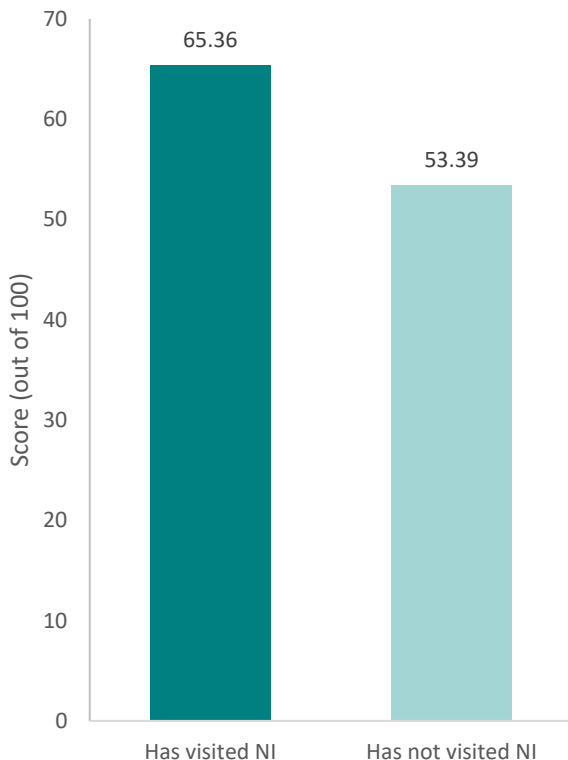
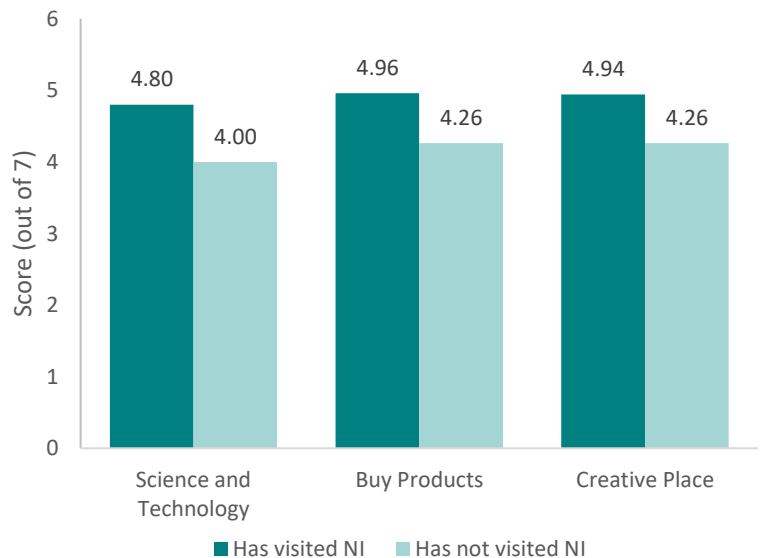


Figure 5: Attribute scores (Exports dimension) – those who have visited Northern Ireland and those who have not



*Statistically significant differences are at the 95% confidence level. This means that we can be 95% confident that the differences between groups are actual differences and have not just arisen by chance.

Proportion of participants who agreed or disagreed with each Exports attribute statement

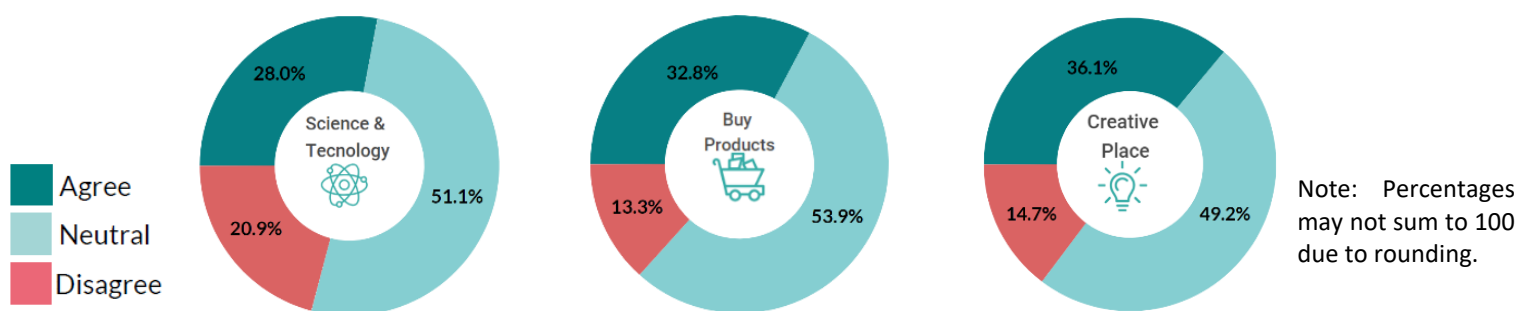
It is also useful to consider the proportion of participants who either agreed or disagreed with each attribute statement* (see Figure 6). The proportions reported below for the attributes within the Exports dimension are all similar to those observed in previous years.

More than a third of participants agreed that Northern Ireland is a creative place (36 per cent) and just under a third (33 per cent) indicated that they would feel better about buying a product knowing that it was made in Northern Ireland.

The statement with which the highest proportion of participants disagreed was that Northern Ireland makes a major contribution to innovation in science and technology (21 per cent).

Around half of participants provided a neutral response in relation to each of the attributes within the Exports dimension. These neutral proportions were higher for the three Exports attributes than for all for other attributes. This could suggest that participants did not feel informed enough to agree or disagree confidently regarding Northern Ireland's contribution to innovation in science and technology, the appeal of its products or its creativity.

Figure 6: Proportion of participants who agreed or disagreed with each attribute statement within the Exports dimension



Products and services associated with Northern Ireland

Participants were asked to select, from a predetermined list, the products or services they most associated with Northern Ireland (participants could choose more than one response). The most common response was 'none of these' (43 per cent of participants). 'None of these' was selected less frequently for similar questions on all five other dimensions. Figure 7 presents adjectives chosen by remaining participants. The product or service most commonly associated with Northern Ireland was 'Agriculture' (21 per cent), followed by 'Food' (15 per cent), 'Crafts' (11 per cent), 'High Technology' and 'Film and television' (both 8 per cent). These proportions were similar to those observed in 2018 though 'Food' and 'Film and television' were more commonly associated with Northern Ireland than previously.

Figure 7: Products or services associated with Northern Ireland



Further information

The other five bulletins for the Six Dimensions of the NBISM, as well as data tables and infographics, are available from:

<https://www.executiveoffice-ni.gov.uk/publications/six-dimensions-nation-brands-index-2019>

The overall NBISM report (published February 2020), data tables and methodological documents are available from:

<https://www.executiveoffice-ni.gov.uk/publications/nation-brands-index-2019-report-northern-ireland>

*For each attribute statement, survey participants reported to what extent they agreed or disagreed on a seven point Likert scale, where one is strongly disagree, four is neither agree nor disagree, and seven is strongly agree. Participants who provided scores between one and three were categorised as disagreeing with the statement, scores between five and seven were categorised as agreeing, while scores of four were categorised as neutral.