

International Perceptions of Northern Ireland: Immigration and Investment

The Anholt-GfK Roper Nation Brands IndexSM, 2016 May 2017

Introduction

In order to assess and monitor its international reputation, Northern Ireland was included on the Anholt GfK-Roper Nation Brands IndexSM (NBISM) for the first time in 2016.

The NBISM is an analytical tool which measures and ranks the broad international reputation of 50 nations, across six dimensions of national competence: Exports; Governance; Culture; People; Tourism; and Immigration and Investment.

The 2016 NBISM involved the completion of over 20,000 online surveys, across 20 major developed and developing panel countries, with at least 1,000 surveys per panel country.

This bulletin examines how Northern Ireland is viewed in relation to the Immigration and Investment dimension. The overall score for this dimension was calculated using scores from five questions (attributes): Live & Work; Quality of Life; Educational Qualifications; Invest in Business; and Equality in Society. For each attribute, respondents were presented with a statement and asked to state to what extent they agree or disagree on a seven point Likert scale, where 1 is strongly disagree, 4 is neither agree nor disagree, and 7 is strongly agree.¹ Table 1 presents these statements.

All rankings presented in the report are out of 50. The overall score for the Immigration and Investment dimension is 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).

The overall published report, associated data tables and accompanying methodological document are available from: <https://www.executiveoffice-ni.gov.uk/publications/anholt-gfk-roper-nation-brands-index-2016-report-northern-ireland>.

Northern Ireland's NBISM Score and Ranking for the Immigration and Investment dimension

Northern Ireland received an overall NBISM score of 55.25 on the Immigration and Investment dimension. Despite the relatively low score, this dimension was ranked relatively highly (20th) when compared to the other participating nations.

Figure 1: Overall ranking and score for Northern Ireland's Immigration and Investment



Table 1: Attribute statements, Immigration and Investment dimension

Attribute	Statement
Live & Work	'Please rank your willingness to live and work for a substantial period in Northern Ireland.'
Quality of Life	'This country is a place with a high quality of life.'
Educational Qualifications	'This country is a good place to study for educational qualifications.'
Invest in Business	'This country has businesses I'd like to invest in.'
Equality in Society	'This country cares about equality in society.'

¹ For the 'Live & Work' attribute the anchoring words were as follows: 7 meant respondents would be 'Very Willing' to live and work for a substantial period in Northern Ireland; 1 meant respondents would be 'Very Unwilling' to live and work for a substantial period in Northern Ireland; and 4 meant respondents were neither willing nor unwilling.

International Perceptions of Northern Ireland: Immigration and Investment

May 2017

Pg2

Immigration and Investment rankings and scores from around the world

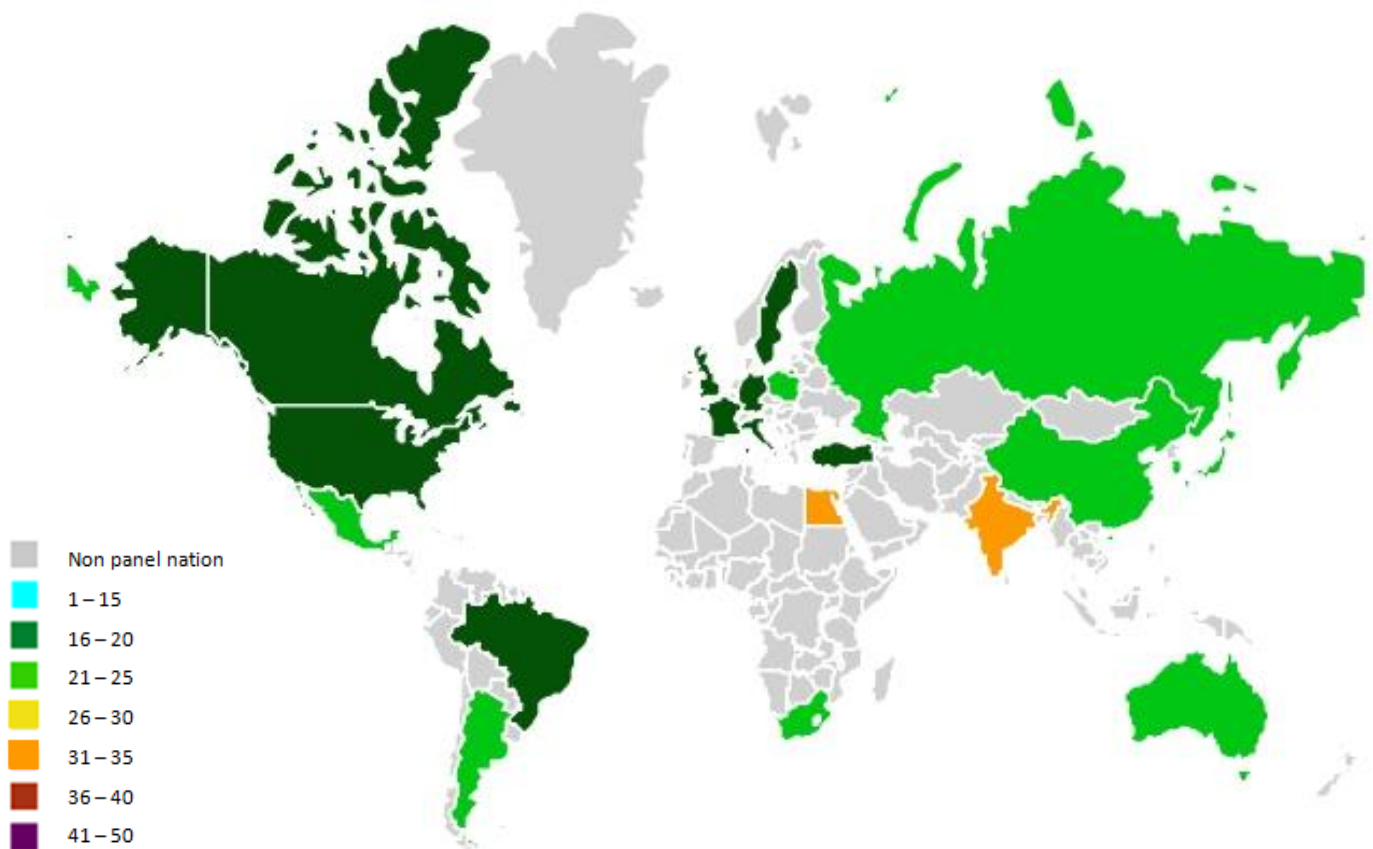
Northern Ireland was relatively highly ranked globally in terms of Immigration and Investment, with most panel nations providing the region with a ranking between 18th and 25th (Figure 2). The highest rankings were received from the United Kingdom (18th), Brazil, Turkey, Germany and France (all 19th). The only countries from which Northern Ireland received a ranking lower than 25th were Egypt (32nd) and India (34th).

While rankings provide an insight into how Northern Ireland is viewed by panel countries relative to the other participating nations, the overall dimension score provides a more absolute understanding of how Northern Ireland is viewed in relation to immigration and investment, 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 highest score was received from India (61.89), with relatively high scores also received from Brazil (60.15), Mexico (59.86), and South Africa (58.98). Northern Ireland's lowest scores were received from Russia (51.81), Sweden (50.17) and Japan (46.87).

Northern Ireland's relatively high ranking (22nd) and low score (46.87) from Japan, contrasts with the relatively low ranking (34th) and high score (61.89) from India. This suggests that the distribution of scores varies across different panel countries.

Figure 2: Northern Ireland Immigration and Investment rankings from around the world



International Perceptions of Northern Ireland: Immigration and Investment

May 2017

Attribute Scores and Rankings

The score for each attribute was 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 or negative).

Northern Ireland's attribute scores for this dimension ranged from 4.01 (Invest in Business) to 4.61 (Quality of Life). This reflected a neutral to positive perception Northern Ireland in relation to immigration and investment.

For four out of the five attributes, Northern Ireland was ranked 20th out of the 50 participating nations, with a slightly lower rank received for participants' willingness to invest in Northern Ireland's businesses (24th) (Figure 3).

Attribute scores in relation to previous visits to Northern Ireland

In 2016, 8% of NBISM respondents had previously visited Northern Ireland. Respondents who had previously visited the region scored Northern Ireland significantly higher² for the Immigration and Investment dimension overall, as well as for each of the individual attributes, than those who had not (Figures 4 and 5).

Figure 4: Difference in Immigration and Investment dimension scores between those who have visited Northern Ireland and those who have not

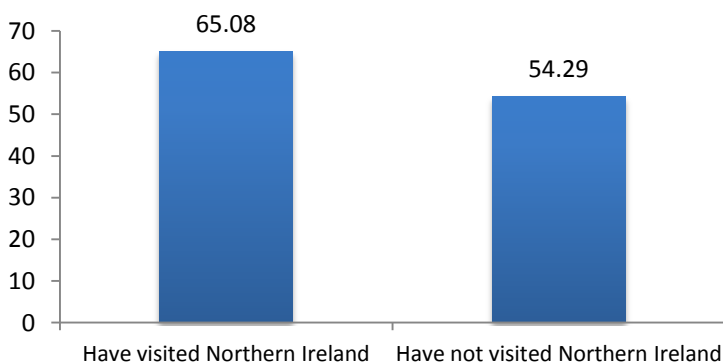
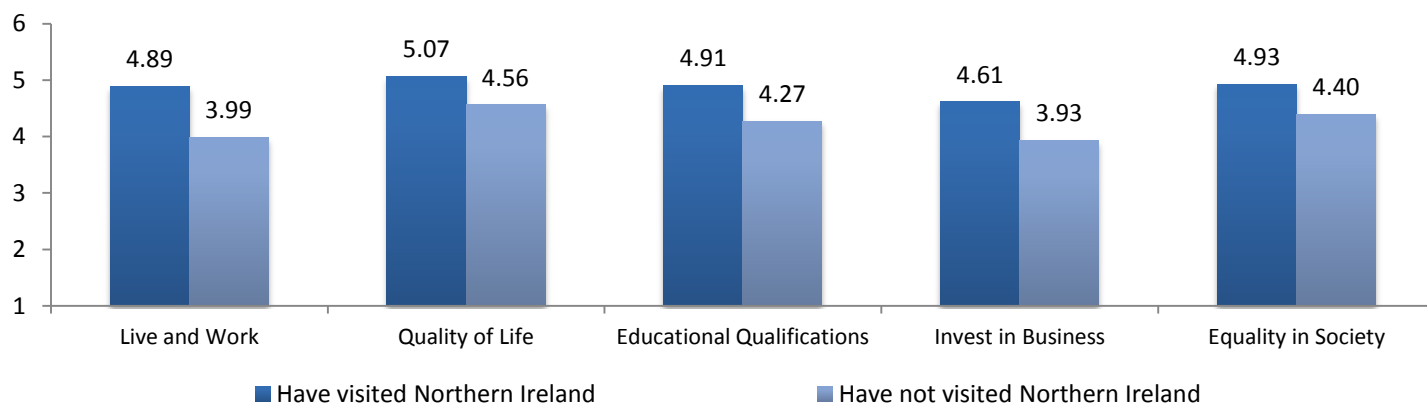


Figure 5: Difference in attribute scores between those who have visited Northern Ireland and those who have not



² P < 0.001

Figure 3: Overall ranking and score for Northern Ireland's Immigration and Investment attributes



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

International Perceptions of Northern Ireland: Immigration and Investment

May 2017

Pg4

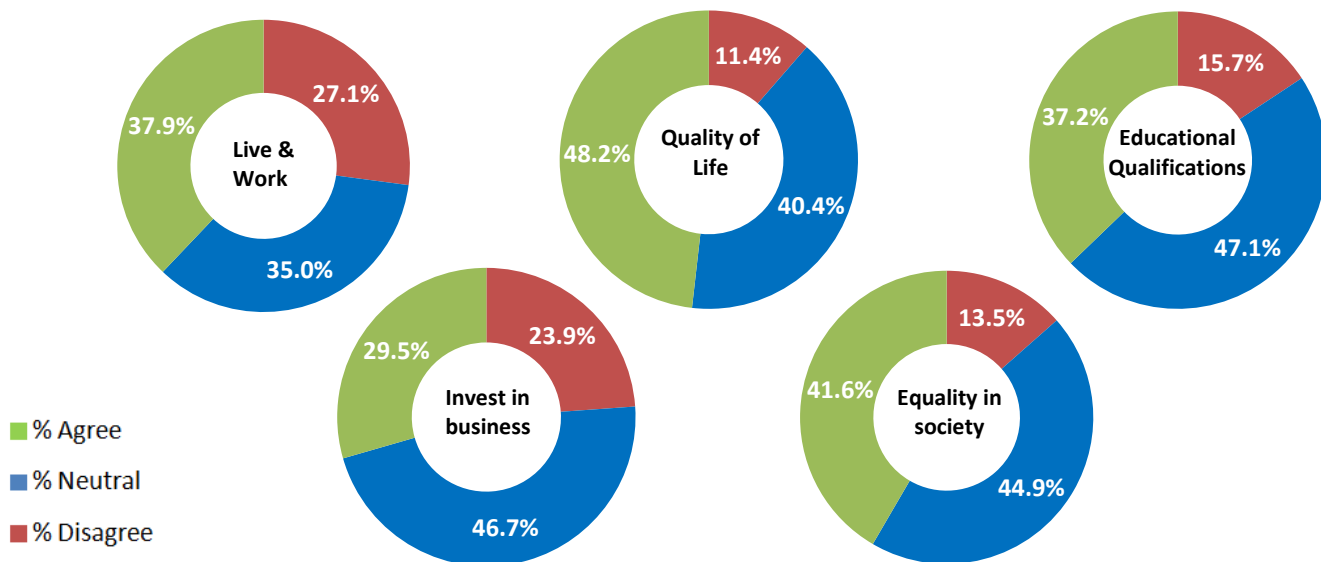
Attributes of the Immigration and Investment dimension: proportion of respondents who agreed or disagreed with each statement

As well as examining the overall scores and ranks, it was also possible to consider the proportion of respondents who either agreed or disagreed with each attribute statement³.

Levels of agreement exceeded 35% for four out of the five attribute statements, with just under half of respondents agreeing with the statement that Northern Ireland is a place with a high quality of life (48.2%). A smaller proportion of respondents (29.5%) agreed with the statement that Northern Ireland has businesses that they would like to invest in (Figure 6).

Approximately one quarter of respondents indicated that they would not be willing to live and work in Northern Ireland (27.1%), while 23.9% of respondents disagreed with the statement that Northern Ireland has companies that they would like to invest in. These were the two highest rates of disagreement Northern Ireland received for any of the 23 attributes of the NBISM.

Figure 6: Proportion of respondents who agreed or disagreed with each attribute statement



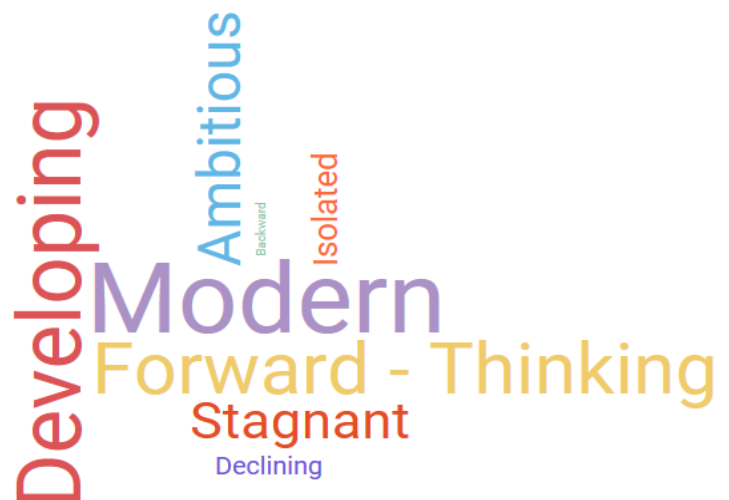
Words associated with Northern Ireland's economic and business conditions

Respondents were asked to select the adjectives, from a predetermined list, that they thought would most accurately describe Northern Ireland's current economic and business conditions. Figure 7 presents a word cloud of the results.⁴

The words respondents most commonly associated with the current economic and business conditions of Northern Ireland were; 'Modern' (16% of respondents), 'Developing' (14%), 'Forward Thinking' (12%), and 'Ambitious' (10%).

A much smaller proportion of respondents associated the words 'Backward' (3%), 'Declining' (5%), 'Isolated' (6%) and 'Stagnant' (9%) with the current economic and business conditions of Northern Ireland.

Figure 7: Words associated with Northern Ireland's economic and business conditions



³ For each attribute statement, respondents reported to what extent they agreed or disagreed on a seven point Likert scale, where 1 is strongly disagree, 4 is neither agree nor disagree, and 7 is strongly agree. Respondents who provided a scores between 1 and 3 were categorised as disagreeing with the statement, scores between 5 and 7 were categorised as agreeing, while scores of 4 were categorised as neutral. For the 'Live and Work' attribute, appropriate alternative anchor words used – please refer to footnote 1.

⁴ Respondents were able to select more than one adjective from the predetermined list of words to describe Northern Ireland's current economic and business conditions, therefore the total may be higher than 100%.