

International Perceptions of Northern Ireland: Tourism

Six Dimensions of the Nation Brands IndexSM 2017

Bulletin 5, May 2018

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 and then again in 2017.

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.

The 2017 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 **Tourism** dimension. The score for this dimension was calculated using scores from five questions (attributes): Visit if Money was No Object; Natural Beauty; Historic Buildings; and Vibrant City Life. For each attribute, respondents 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. These statements are presented in Table 1.

All rankings presented in the report are out of 50. The overall score for the Tourism dimension is out of 100, while the score for each of the attributes is an average of respondents' scores, based on a scale from one to seven (with seven being the highest and best, and one being the lowest and worst).

This bulletin is the fifth in a series on the six dimensions of the NBISM. The other five bulletins, associated data tables and infographics are available from: <https://www.executiveoffice-ni.gov.uk/publications/six-dimensions-nation-brands-index-2017>.

The overall NBISM report (published in February 2018), associated data tables and accompanying methodological documents are available from: <https://www.executiveoffice-ni.gov.uk/publications/anholt-gfk-roper-nation-brands-index-2017-report-northern-ireland>.

Northern Ireland's NBISM score and ranking for the Tourism dimension

Northern Ireland received an overall score of 64.42 on the Tourism dimension (up from 63.27 in 2016). This means that Northern Ireland was ranked 28th out of the 50 participating nations in 2017 (no change since 2016). Tourism was Northern Ireland's highest scoring dimension but received the second lowest ranking of the six dimensions, both in 2016 and 2017.

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

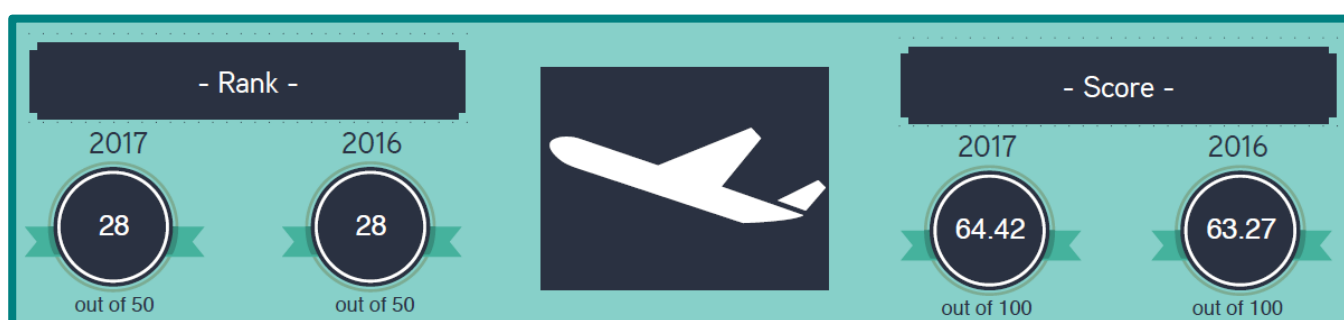


Table 1: Attribute statements, Tourism dimension

Attribute	Statement
Visit if Money was No Object	'Please give each country a rating from 1 to 7 where 7 means you would 'strongly like to visit' if money was no object and 1 means you would 'strongly not like to visit' if money was no object.'
Natural Beauty	'This country is rich in natural beauty.'
Historic Buildings	'This country is rich in historic buildings and monuments.'
Vibrant City Life	'This country has a vibrant city life and urban attractions.'

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Tourism rankings and scores from around the world

Northern Ireland's Tourism received a range of rankings globally, with the highest rankings received from European and Anglo-American nations (Figure 2), as was also noted in 2016.

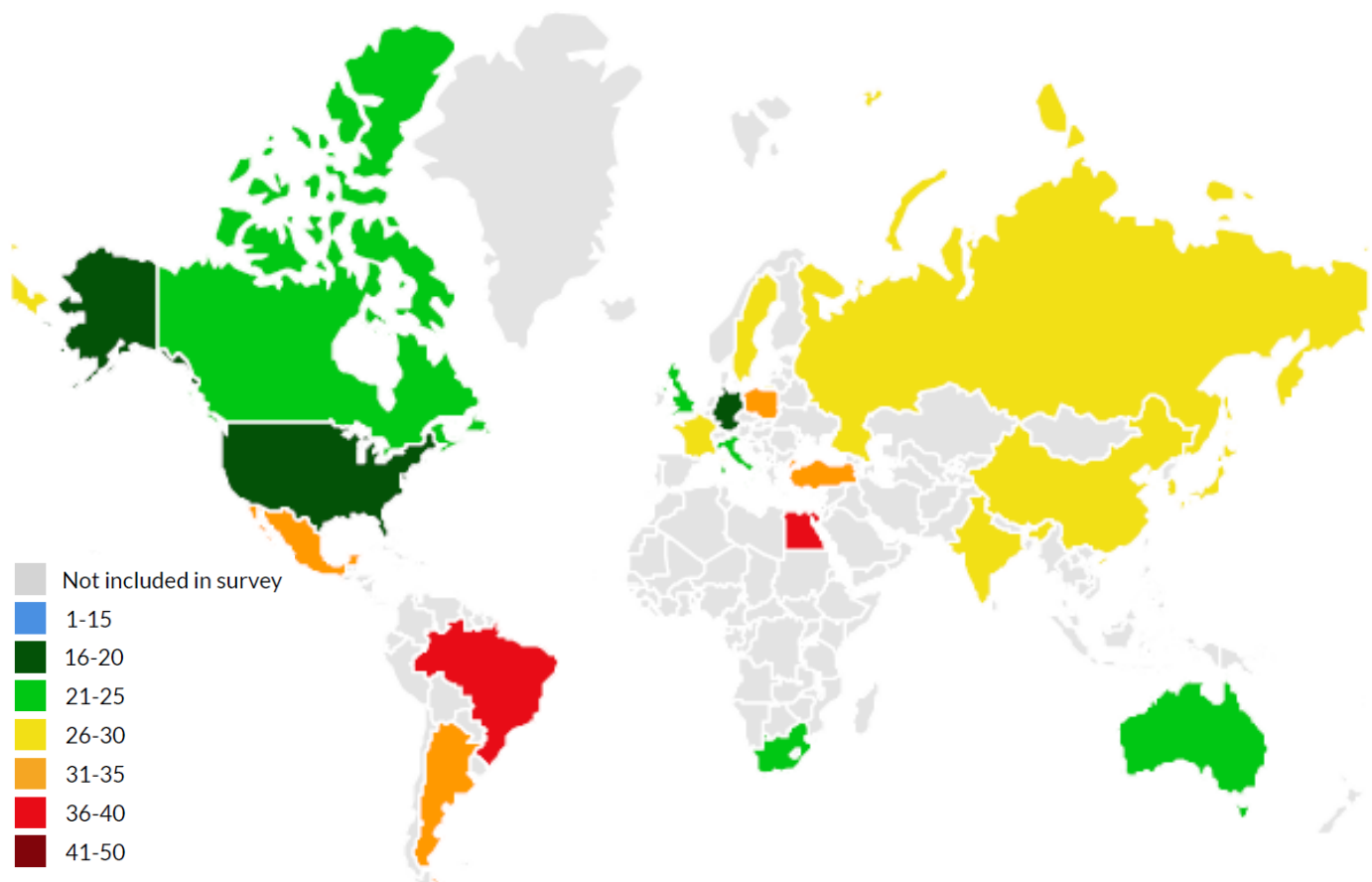
The highest rankings were received from Germany, the United States (20th respectively), Italy, the United Kingdom (21st respectively) and Australia (22nd). Northern Ireland's lowest rankings were received from Egypt, Brazil (36th respectively), Argentina and Poland (33rd).

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 highest score was received from Mexico (69.58) as was also the case in 2016. NI also received relatively high scores from India (69.23), the United States (68.76), Russia (67.82), China (67.16) and Germany (67.16) in 2017. Northern Ireland's lowest scores were received from Japan (55.14), South Korea (59.61) and Sweden (60.90).

Northern Ireland's moderate rank (27th) and low score (59.61) from South Korea, contrasts with the relatively low rank (32nd) and high score (69.58) from Mexico. This suggests that the distribution of scores varies across different panel countries.

Figure 2: Northern Ireland Tourism rankings from around the world



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Attribute scores and rankings

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

Northern Ireland's overall score for each attribute on the Governance dimension was noted to be positive (i.e. above the neutral value of 4) in both 2016 and 2017. Scores ranged from 4.68 (Historic Buildings and Vibrant City Life) to 5.14 (Natural Beauty) in 2017. The score for Natural Beauty (5.14) was the highest score Northern Ireland received for any of the 23 attributes across the six dimensions of the NBISM both in 2016 and 2017.

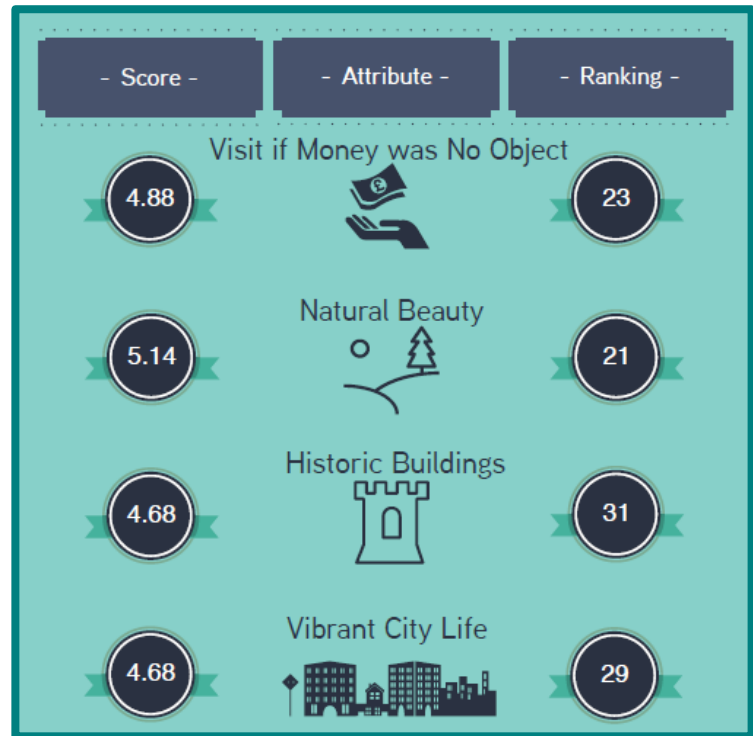
When attribute scores were compared with the other participating nations, Northern Ireland was ranked relatively highly in relation to Natural Beauty (21st out of the 50 nations) and respondents' willingness to visit NI if money was no object (23rd). Lower rankings were received for Vibrant City Life (29th) and Historic Buildings (31st) (Figure 3). This pattern was also evident in 2016.

Attribute scores in relation to previous visits to Northern Ireland

In 2017, nine per cent of NBISM respondents reported that they had previously visited Northern Ireland.

Respondents who had previously visited the region, scored Northern Ireland significantly higher on the Tourism 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 2016.

Figure 3: Attribute rankings and scores for Northern Ireland's Tourism



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

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

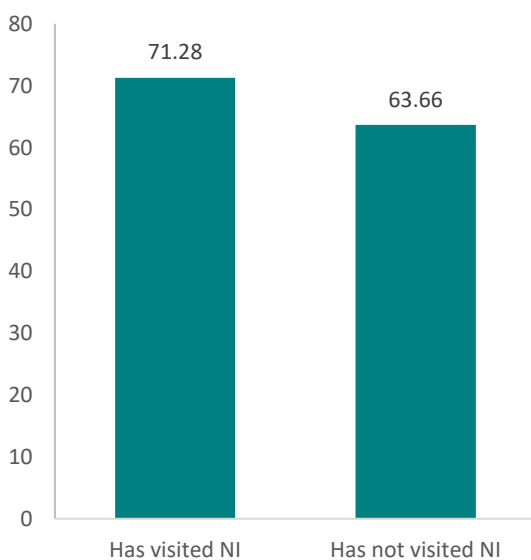
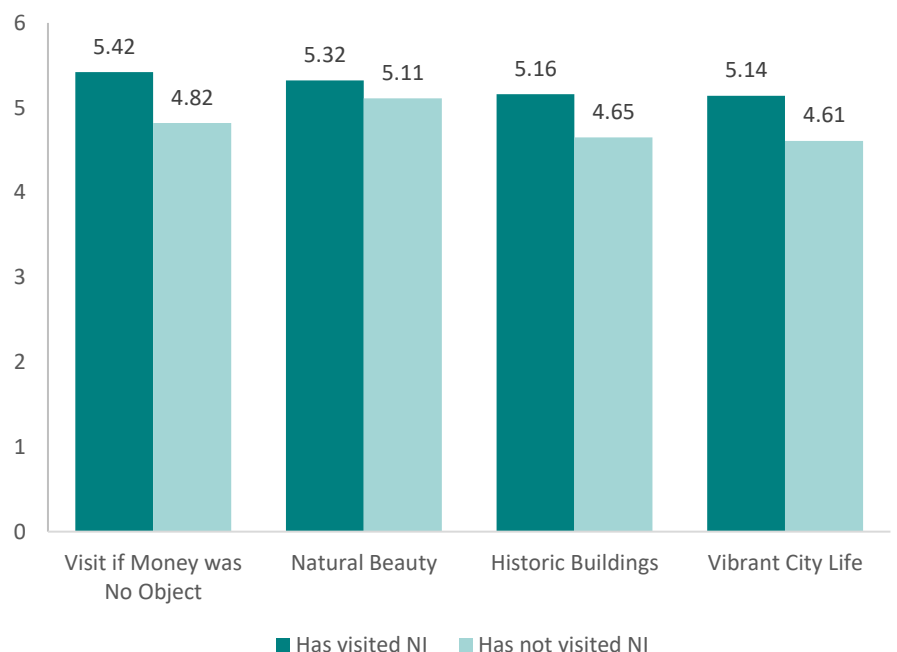


Figure 5: Difference in Tourism attribute scores between those who have visited Northern Ireland and those who have not



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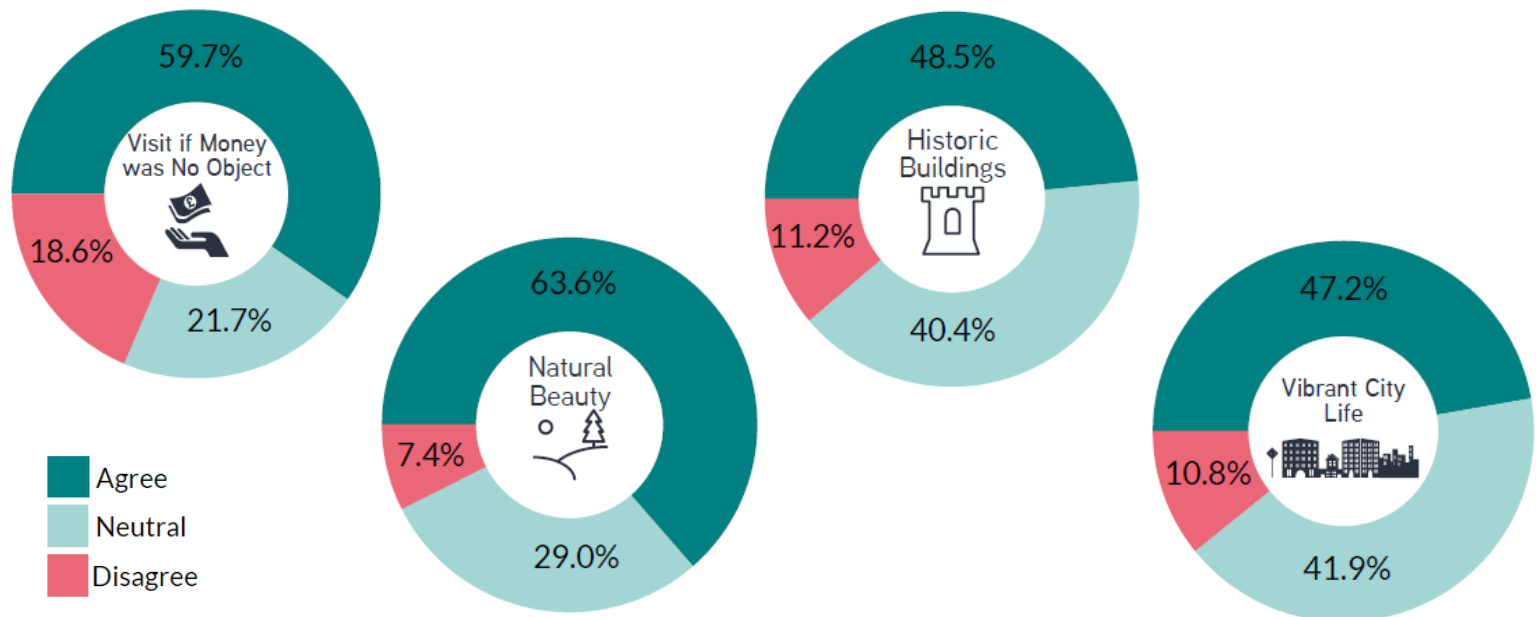
Attributes of the Tourism dimension: Proportion of respondents who agreed or disagreed with each attribute statement

As well as examining scores and rankings, it is also useful to consider the proportion of respondents who either agreed or disagreed with each attribute statement* (see Figure 6). The proportions reported below for the attributes within the Tourism dimension were all similar to those observed in 2016.

A large proportion of respondents agreed that Northern Ireland is rich in natural beauty (64 per cent) and six in ten indicated they would be willing to visit Northern Ireland if money was no object). These were the highest levels of agreement with any of the 23 attributes of the NBISM. A relatively large proportion of respondents also agreed that Northern Ireland was rich in historic buildings (48 per cent) and had a vibrant city life (47 per cent).

Relatively small proportions of respondents disagreed that Northern Ireland was rich in natural beauty (seven per cent), was rich in historic buildings and had a vibrant city life (11 per cent respectively). A larger proportion indicated that they would not be willing to visit Northern Ireland if money was no object (19 per cent).

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



Words associated with the experience of visiting Northern Ireland

Respondents were asked to select, from a predetermined list, the adjectives they felt would most accurately describe the experience of visiting Northern Ireland (respondents could choose as many answers as they liked). The most common response was 'none of these' (26 per cent of respondents). Figure 7 presents a word cloud of the adjectives that were chosen by remaining respondents.

The words most commonly associated with the experience of visiting Northern Ireland were 'Fascinating' (24 per cent), 'Exciting' (21 per cent), 'Educational' (18 per cent), 'Relaxing' (17 per cent) and 'Romantic' (13 per cent).

A smaller proportion of respondents associated the words 'Spiritual' and 'Risky' (eight percent respectively), 'Boring' (seven per cent), 'Stressful' and 'Depressing' (five per cent respectively) with the experience of visiting Northern Ireland.

Figure 7: Words associated with the experience of visiting Northern Ireland



These proportions were all similar to those observed in 2016.

*For each attribute statement, respondents 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. Respondents 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.