

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

Methodological Report

February 2017

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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) survey 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. This document provides an overview of the methodology and quality control procedures employed by GfK in the completion of the 2016 NBISM survey. It is based on a Methodology and Quality Control Report prepared by GfK for the Executive Office.
5. The main report for Northern Ireland, 'The Anholt – GfK Roper Nation Brands IndexSM: 2016 report for Northern Ireland,' is available from: <https://www.executiveoffice-ni.gov.uk/articles/equality-research-publications>

Participating Nations

6. The list of 50 nations who had subscribed to take part in the 2016 NBISM were as follows, listed by region:

North America: The U.S., Canada, Cuba¹

Western Europe: The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Holland, Switzerland, Finland, Austria, Greece, Belgium, Northern Ireland¹

Central/Eastern Europe: Russia, Poland, Czech Republic, Hungary, Turkey, Kazakhstan¹

Asia-Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Singapore, Taiwan, Australia, New Zealand

Latin America: Argentina, Brazil, Mexico, Chile, Peru, Colombia, Ecuador

Middle East/Africa: United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Kenya, Nigeria, Qatar

Panel Country Selection

7. The 2016 NBISM survey was conducted across 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural and tourism activities. Given the increasing global role played by developing countries, the survey strived to represent regional balances as well as attempting to balance high-income and middle-income countries. The core 20 panel countries are:

Western Europe/North America: The U.S., Canada, the UK, Germany, France, Italy, Sweden

¹ Nations new to the NBISM 2016. Three nations measured in 2015 but not in 2016 are Flanders, Puerto Rico, and Ukraine

Central and Eastern Europe: Russia, Poland, Turkey
Asia-Pacific: Japan, China, India, South Korea, Australia
Latin America: Argentina, Brazil, Mexico
Middle East/Africa: Egypt, South Africa

Respondent Selection

8. In all, 20,353 online surveys were conducted for the 2016 NBISM, with at least 1,000 per core panel country. In each panel country the list of 50 examined nations was randomly assigned to the 1,000 respondents, each of whom (except Egypt) rated 25 nations, resulting in each nation providing approximately 500 ratings per panel country. In Egypt, where respondents are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation getting approximately 200 ratings.
9. As discussed, in each core panel country, at least 1,000 adults who are internet users were surveyed. Pre-recruited online panels were utilised for the study. Large and regularly updated panels were selected for each country where quality control procedures such as frequent respondent identity verification are practiced (see General Panel Maintenance and Panel Quality Control section for details).
10. Online research best practice often utilises an approach called “blended panels”, i.e., using more than one online panel to achieve the total sample. This practice was utilised to help mitigate unknown sources of biases that may be attributable to one single panel. Online sampling approaches were kept consistent across NBISM survey waves while gradually adopting the latest best practice methodology. Following best practices, a blended sample that was consistent with 2015, where 90% of the overall blended sample was comprised of 2011 panel sources, and the remaining 10% from new sources. This methodology was been used in all 20 panel countries in 2016.
11. Based on the most up-to-date online population statistics in each country, the outgoing sample in each country is stratified by four sample cells: males 18-34 and 35+, and females 18-34 and 35+. For each cell, random sample replicates were drawn and invitations were then sent out to respondents to participate in the survey.

Fieldwork Dates and Fieldwork Quality Control

12. In all, 20,353 online surveys have been conducted, with at least 1,000 per country for the 2016 NBISM. GfK Online Operations’ online survey server hosted the surveys for all panel countries. Field dates were July 7th to July 25th, 2016 for all countries.
13. Survey data validation and cleaning was an essential part of the quality control procedure. Unlike telephone or face-to-face surveys, which are administered by trained interviewers, online surveys are self-administered and are therefore at a higher risk of respondent error or falsification. The quality control procedure started with the removal of “speeders” (respondents who complete the survey in an unreasonably fast amount of time). A patterned response analysis was then conducted which examined: Straight-lining (clicking through a survey giving the same answers for each item); Extremism (exclusive use of only extreme response options); and Zig-zagging (moving diagonally across response items in a grid). Offending respondents’ questionnaires were removed from the data-file and replacement surveys were added. Additionally, Gatekeeper, a proprietary de-duplicating system, was used to prevent a respondent from entering and completing the survey more than once.

General Panel Maintenance and Panel Quality Control

14. For online panel quality control in general, ongoing strict verification and cleaning rules were in place including the removal of lapsed panellists and undeliverable emails. The ongoing monitoring system of the panels also identified potential fraudulent behaviour based on survey-taking activities and patterns; offending panellists were then removed from the panel. At the same time, the panel supplier continually recruited new members to ensure that the panel was dynamic in nature and reflected changes in online population composition over time.
15. Panellists were only contacted for the purposes of conducting market or survey research. They were not exposed to third party advertising or direct marketing campaigns during the survey process. A real-time support help desk was provided for panellists in their native language to solve any technical problems that may have occurred and to ensure the experience in survey participation was satisfactory. Respondents' personal data was not sold to third parties.
16. Panel operators employed a variety of incentive approaches, while obeying the rules and laws of the panel nation, and based on what works best within a given country. Such incentives include donations to charity on behalf of panellists, sweepstakes, points, gift cards, prizes, music downloads and cash payments.

Sample Balancing and Weighting

17. For NBISM 2016, multiple outgoing sample replicates are carefully spaced across the two week field period so that the achieved total sample in each country includes early and late responders, as well as weekday and weekend responders. This procedure ensures sufficient fielding periods for each launched replicate to ensure responses from people who have different time availability (reflecting age, lifestyle and working status differences) and to minimise early responder biases.
18. Using the most up-to-date online population parameters, the achieved sample in each country was weighted to reflect key demographic characteristics such as age, gender and education of the online population in that country. Additionally, in the United States, the United Kingdom, South Africa, India and Brazil, race/ethnicity was used for sample balancing. Weights for each country were calculated by GfK's in-house Sampling Statistics department.
19. As the achieved sample sizes may vary slightly across survey countries, when computing the aggregated 20-country average, "one-country-one-vote" weighting is applied so each survey country was treated equally in the global average.

Questionnaire Development and Implementation

20. The NBISM measures the power and appeal of each country's "brand image" by examining six core dimensions of national competence, the 6 core dimensions are;
 - **Exports:** This is what marketers call the "country of origin effect" – whether knowing where the product is made increases or decreases people's likelihood of purchasing it, whether a country has particular strengths in science and technology, and whether it has creative energy. Perceived associations with particular industries round out that country's image in this space.

- **Governance:** This aspect incorporates perceived competency and honesty of government, respect for citizens' rights and fair treatment, as well as global behaviour in the areas of international peace and security, environmental protection and world poverty reduction. Respondents also select one adjective that best describes the government in each country.
 - **Culture:** Cultural aspects measured are perceptions of a country's heritage, its contemporary cultural "vibes" from music, films, art and literature, as well as the country's excellence in sports. Various cultural activities are presented to the respondents to gauge their strongest images of a country's cultural "product."
 - **People:** The general assessment of people's friendliness is measured by whether respondents would feel welcome when visiting the country. Additionally, the appeal of the people on a personal level is measured – whether respondents want to have a close friend from that country – as well as human resources on a professional level, that is, how willing respondents would be to hire a well-qualified person from that country. Respondents are also asked to select adjectives out of a list to describe the predominant images they have of the people in each country.
 - **Tourism:** Respondents rate a country's tourism appeal in three major areas: natural beauty, historic buildings and monuments, and vibrant city life and urban attractions. Tourism potential is also asked: how likely they would be to visit a country if money is no object and the likely experience represented by adjectives such as romantic, stressful and spiritual.
 - **Immigration and Investment:** Lastly, a country's power to attract talent and capital is measured not only by whether people would consider studying, working and living in that country but also by the country's economic prosperity, equal opportunity and ultimately the perception that it is a place with a high quality of life. The country's economic and business conditions – whether stagnant, declining, developing or forward-thinking – complete the measurement in this space.
21. The NBISM score is an average of the scores from these six dimensions. There are between three and five attributes that are used to calculate the scores for each core dimension. Ratings for each attribute are 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. Each dimension also has a word choice question which helps enrich the understanding of the properties of a nation's image.

Questionnaire Outline

22. The questionnaire for all survey countries contains the following questions:
- Awareness of nations: very familiar, familiar, some knowledge, know name only, haven't heard of
 - Favourability toward nations: (7 point scale: 7 = Extremely favourable, 4 = Neither favourable nor unfavourable, 1 = Extremely unfavourable)
 - Experience with and attitudes regarding nations: visited for vacation, for business, purchased products or services from country; visited websites from country; regional favourability; personal values

- Nation Brands core dimension questions, which are ratings scale questions, and word association questions in each of the six Nation Brands areas. For the ratings questions, seven-point scales anchored by strongly agree and strongly disagree, and middle point anchored by neither agree nor disagree (or other appropriate anchor words) were used:

Exports:

- feel better/worse about buying products from the country;
- makes major contribution to innovation in science and technology;
- is a creative place with cutting-edge ideas and new ways of thinking;
- product/service categories most associated with each country (multiple answers allowed in 2009-2016; single answer in 2008)

Governance:

- is competently and honestly governed;
- respects rights of its citizens and treats them with fairness;
- behaves responsibly in international peace and security;
- behaves responsibly to protect the environment;
- behaves responsibly to help reduce world poverty;
- adjectives most accurately describe the government (single word answer only for 2008-2016)

Culture:

- excels at sports;
- has rich cultural heritage;
- is an interesting/exciting place for contemporary culture such as music, films, art and literature;
- cultural activities/products most expected to see produced (multiple answers allowed in 2009-2016; single answer in 2008)

People:

- would like a person from country as close friend;
- the people would make me feel very welcome;
- willingness to hire well-qualified people from country;
- adjectives most accurately describe people (multiple answers allowed in 2009-2016; single answer in 2008)

Tourism:

- strongly like/not like to visit if money is no object;
- rich in natural beauty;
- rich in historic buildings and monuments;
- has a vibrant city life and urban attractions;
- words most accurately describe experience of visit (multiple answers allowed in 2009-2016; single answer in 2008)

Immigration and Investment:

- willingness to live and work for substantial period;
- place with a high quality of life;
- good place to study for educational qualifications;
- has businesses I'd like to invest in;
- country cares about equality in society;
- word which most accurately describes current economic and business conditions (single word answer only for 2008-2016)

- Standard demographic questions, including age, gender, type of area lived in, education, employment status, profession, income, plus where applicable, geographical region and race/ethnicity
23. The NBISM core question items had been developed and translated into local languages prior to 2008. When new question items were developed, they were translated into the appropriate languages by professional translators, and proof-reading of the translations was done by separate translation teams to ensure accuracy. Translators also check for proper grammar, syntax, style and punctuation to assure correct understanding at the local country level and in keeping with the intent of the original document. The Standard Guide for Quality Assurance in Translations published by ASTM International is followed.
 24. Online programming of the questionnaire for all survey countries is done by GfK Online Operations. Before the live launch of the survey, the programmed versions in all languages were tested online by either the GfK NBISM research team (for English versions) or by the NBISM translation teams (for non-English versions).

Procedure

25. The implementation of the NBISM survey followed practices endorsed by the American Association for Public Opinion Research and the Council of American Survey Research Organisations, which represent and set standards for the polling industry in the United States.
26. Conscious efforts were made to keep the 2016 NBISM methodology comparable to the 2015 NBISM, as well as NBISM studies between 2008-2014, including questionnaire content, sample design, sampling techniques, fieldwork procedures, and data processing, to facilitate comparisons between years.

Analyses and Reporting

27. Initial data processing and statistical analyses was conducted by GfK's in-house Data Processing department and Marketing Sciences department to generate dimension scores and to provide general statistics. The NBISM score is an average of the scores from the six NBISM dimensions, and each of the six indices is an average of the scores of the ratings questions from the corresponding area. There are between three and five ratings questions for each of the indices. Further analysis, including significance testing, was conducted by the Executive Office Analysis Insights and Outcomes Unit.