

Key points

- In 2018, Tourism ranked 28th of 50 (unchanged since 2017) and received a score of 64.17 (-0.25 since 2017).
- Tourism was Northern Ireland’s highest scoring dimension but the second lowest rank of the six dimensions.
- Northern Ireland’s two highest scoring attributes were in the Tourism dimension (Natural Beauty = 5.15 and Visit if Money was No Object = 4.86).
- Statements relating to the Natural Beauty and Visit if Money was No Object attributes also had the highest agreement rates of any of the 23 attributes for Northern Ireland (64.2 per cent and 59.6 per cent respectively).
- Tourism received significantly higher scores from those who had visited Northern Ireland than those who had not.

Introduction

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

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.

This bulletin examines how Northern Ireland is viewed in relation to the **Tourism** dimension. The score for this dimension is calculated using scores from five 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 countries. 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-2018>.

The overall NBISM report (published February 2019), associated data tables and methodological documents are available from:

<https://www.executiveoffice-ni.gov.uk/publications/anholt-gfk-roper-nation-brands-index-2018-report-northern-ireland>.

Figure 1: Northern Ireland’s NBISM score and ranking for the Tourism dimension



Northern Ireland received an overall score of 64.17 on the Tourism dimension (down from 64.42 in 2017). Northern Ireland was ranked 28th out of the 50 participating nations in 2018 (no change since 2017). As in 2016 and 2017, in 2018 Tourism was Northern Ireland’s highest scoring dimension but received the second lowest ranking of the six dimensions – this suggests that other nations were also scored highly, thus making the Tourism dimension more competitive and resulting in a lower than expected ranking for Northern Ireland.

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.’

Rankings and scores on the Tourism dimension from around the world

Northern Ireland received the widest range of rankings globally on the Tourism dimension compared with the other five dimensions of the NBISM. The highest rankings were received from European and Anglo-American nations (Figure 2), as was also seen in 2016 and 2017.

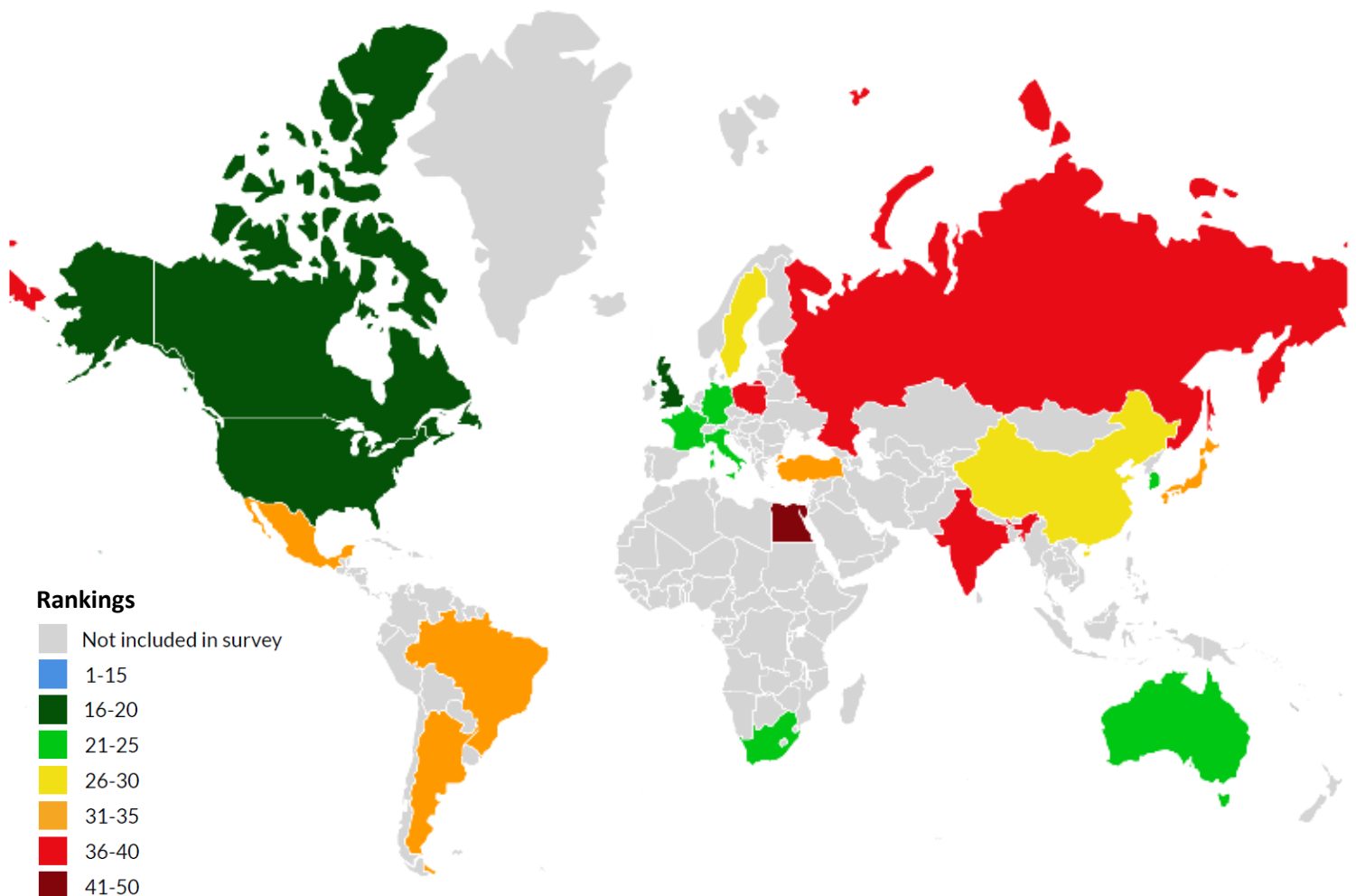
The highest rankings were received from Canada, the United Kingdom and the United States (all 20th), France (21st) and Australia (22nd) and Germany (22nd). Northern Ireland's lowest rankings were received from Egypt (41st) and Russia, Poland and India (all 36th).

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 Tourism dimension was lower in 2018 than in 2017. The Northern Ireland's highest score was received from Mexico (71.51) as was also the case in 2016 and 2017. Northern Ireland also received relatively high scores from South Africa (68.47), India (67.42), Germany (66.02) and Russia (65.98) in 2018. Northern Ireland's lowest scores were received from Japan (54.84), Egypt (60.77) and South Korea (61.32).

Northern Ireland's relatively high rank (22nd) and low score (62.08) from Australia contrasts with the relatively low rank (36th) and high score (67.42) from India. This suggests that scores from different panel countries are not necessarily comparable - it is important to consider both score and rank when evaluating responses from other countries.

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



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 attribute scores on the Tourism dimension were positive (i.e. above the neutral value of 4) in 2018, as they were in 2016 and 2017. Scores ranged from 4.64 (Vibrant City Life) to 5.15 (Natural Beauty) in 2018. The score for Natural Beauty (5.15) was the highest score Northern Ireland received for any of the 23 attributes across the six dimensions of the NBISM in 2018, as it was in both 2016 and 2017.

When attribute scores were compared with the other participating nations, Northern Ireland was ranked relatively highly in relation to Natural Beauty (19th out of the 50 nations) and respondents' willingness to visit Northern Ireland if money was no object (23rd). Lower rankings were received for Vibrant City Life (32nd) and Historic Buildings (31st) (Figure 3). Similar patterns were evident in 2016 and 2017.

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

In 2018, seven per cent of NBISM respondents reported that they had previously visited Northern Ireland.

Respondents who had previously visited the region scored Northern Ireland statistically 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 and 2017.

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

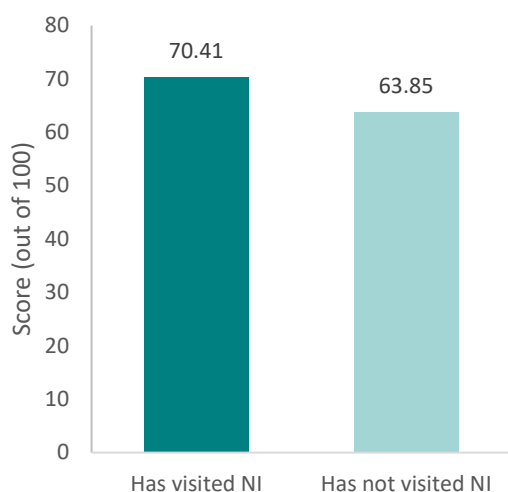


Figure 5: Attribute scores – those who have visited Northern Ireland and those who have not – Tourism dimension

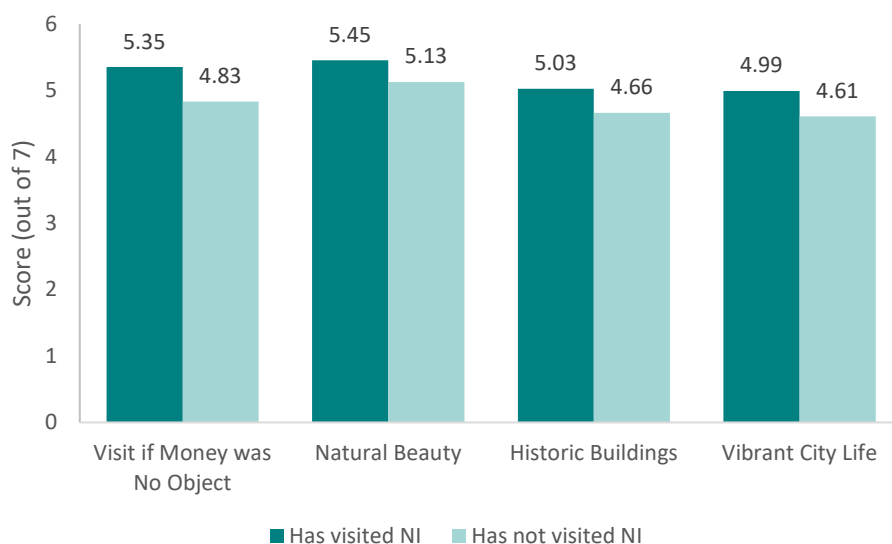


Figure 3: Rankings and scores for Northern Ireland's Tourism attributes

SCORE	ATTRIBUTE	RANK
4.86	Visit if Money was No Object	23
5.15	Natural Beauty	19
4.67	Historic Buildings	31
4.64	Vibrant City Life	32

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

*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.

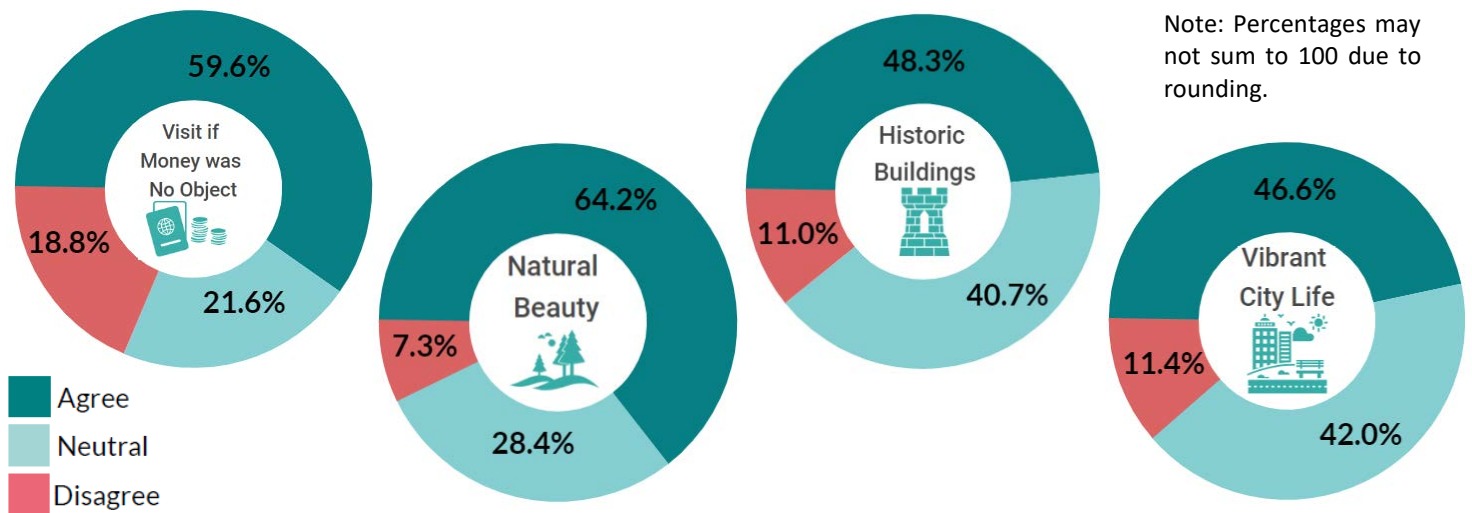
Attributes of the Tourism dimension: Proportion of respondents who agreed or disagreed with each attribute statement

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 and 2017.

A large proportion of respondents agreed that Northern Ireland is rich in natural beauty (64 per cent) and six in ten (60 per cent) indicated they would be willing to visit 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). 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 each). A larger proportion indicated they would not be willing to visit Northern Ireland if money was no object (19 per cent).

Only 22 per cent of respondents felt neutral about visiting Northern Ireland if money were no object and only 29 per cent were neutral about Northern Ireland's natural beauty. These were the smallest neutral proportions of all 23 attribute statements.

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

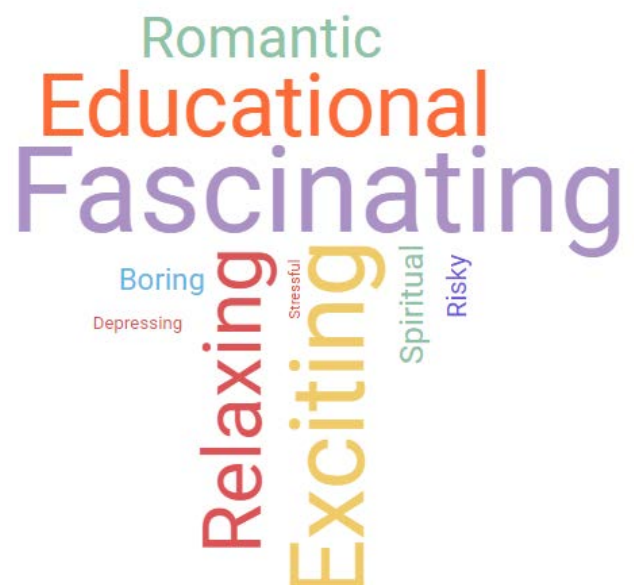
Respondents were asked to select, from a predetermined list, the adjectives they felt would most accurately describe the experience of visiting Northern Ireland (respondents could choose as many answers as they liked). One of the most common responses was 'none of these' (25 per cent of respondents). Figure 7 presents a word cloud of the adjectives that were chosen by remaining respondents.

The word most commonly associated with the experience of visiting Northern Ireland was 'Fascinating' (25 percent of respondents). Large proportions of respondents also selected 'Exciting' (22 per cent), 'Educational' (18 per cent), 'Relaxing' (17 per cent) and 'Romantic' (13 per cent).

Smaller proportions of respondents associated the words 'Spiritual' and 'Boring' (both eight percent), 'Risky' (seven per cent), 'Depressing' (five per cent) and 'Stressful' (four per cent) with the experience of visiting Northern Ireland.

These proportions were similar to those observed in 2016 and 2017.

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



*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.