



# The Anholt-Ipsos Nation Brands Index<sup>SM</sup>

November 2022



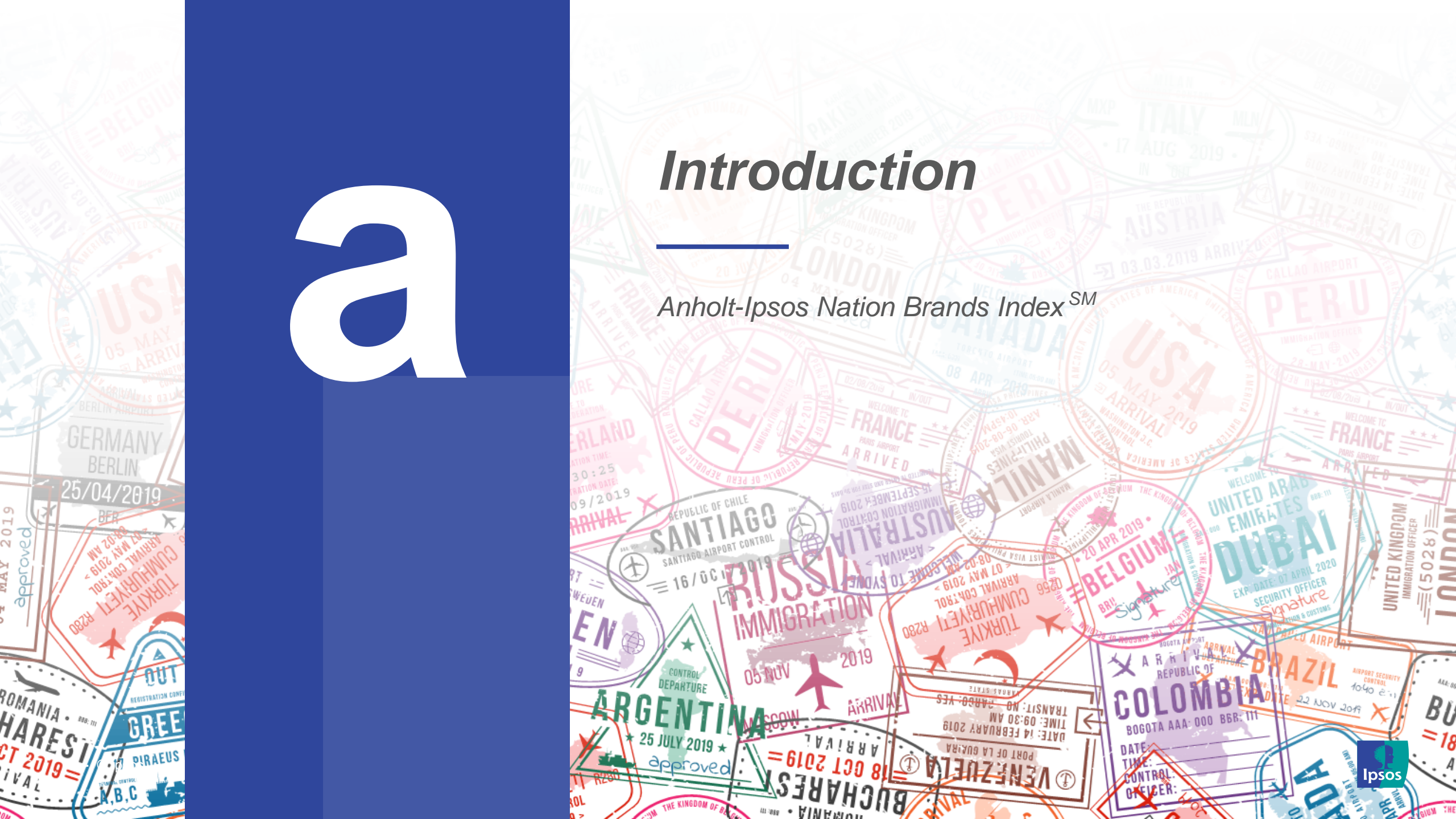
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# Introduction

Anholt-Ipsos Nation Brands Index<sup>SM</sup>

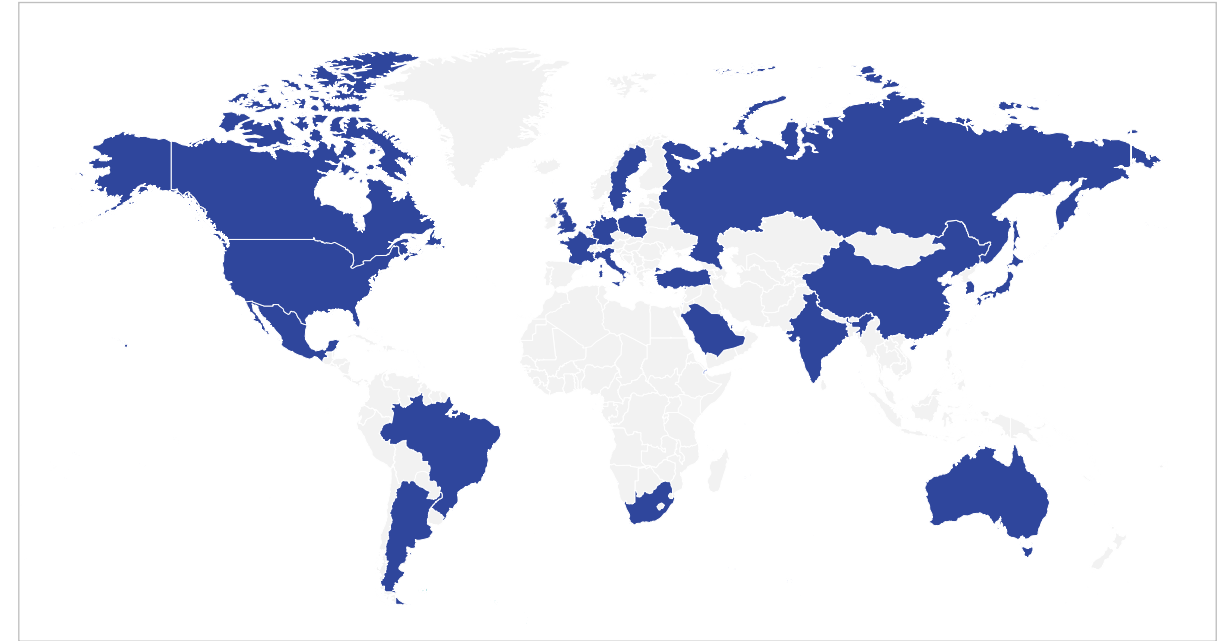


# Introduction to NBI



The NBI survey is conducted in 20 major advanced and emerging economies that play important and diverse roles in international relations and trade, as well as in the flow of business, culture, and tourist activities. Given the increasingly important global role played by developing countries, the survey's recruitment process ensures balanced regional representation as well as balance between high- and middle-income countries.

Respondents were adults aged 18 and over, each interviewed via online survey. Using the most up-to-date online population parameters, the achieved sample in each country was weighted to reflect the key demographic characteristics including age and gender. This report reflects the views and opinions of online populations in these 20 countries.



## The core 20 panel countries:

### *Western Europe/North America*

The U.S., Canada, the UK, Germany, France, Italy, Sweden

### *Central and Eastern Europe*

Russia, Poland, Turkey

### *Asia-Pacific*

Japan, China, India, South Korea, Australia

### *Latin America*

Argentina, Brazil, Mexico

### *Middle East/Africa*

Saudi Arabia\*, South Africa

\*In 2021, Egypt was replaced with Saudi Arabia as a panel country

# Introduction to NBI



NBI measures the global perception for each of 60 nations\*. In each panel country, any 10 of the 60 nations were randomly assigned to respondents, each of whom rated each nation. This resulted in approximately 500 ratings for each nation per panel country.

The selection of 60 nations for this list is based on the political and economic importance of the nations in global geopolitics and in the flow of trade, business, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems were taken into consideration to make the study truly representative of global perceptions. NBI subscription members' interests are also reflected in the selection of the countries. The 2022 list of 60 nations is as follows, listed by region:










\*In 2021, the list of measured nations increased from 50 to 60.

# Understanding the NBI Hexagon

Conducted annually with Ipsos beginning in Spring 2008, the Anholt-Ipsos Nation Brands Index measures the image of 60 nations\*. In 2022, approximately 60,000 adults ages 18 and up are interviewed in 20 core panel countries. The Anholt-Ipsos Nation Brands Index measures the power and appeal of each country's "brand image" by examining global perceptions of six aspects of a nation's identity. Together, these dimensions make up the Nation Brand Hexagon®.



\*In 2021, the list of measured nations increased from 50 to 60.

	<p><b>Exports</b></p>	<p>This aspect examines whether knowing where a product is made increases or decreases the likelihood of it being purchased (also known as the "country of origin effect"), whether a country has particular strengths in science and technology, and whether it is considered to be innovative in national and global pursuits. Additionally, perceived associations of the country with particular industries contribute to its perceived image in this category.</p>
	<p><b>Governance</b></p>	<p>This aspect incorporates the perceived competency and honesty of government and its treatment of citizens and respect for their rights, as well as global behavior in the areas of international peace and security, environmental protection, and the reduction of world poverty. Respondents also select one adjective from a provided list that best describes their perception of the government of each country.</p>
	<p><b>Culture</b></p>	<p>Cultural aspects are measured by gathering perceptions of a country's heritage and its contemporary cultural "vibes" accrued from music, films, art, and literature, as well as its perceived excellence in sports. Respondents' perceptions of the various cultural activities help form a global image of any given country's cultural "product."</p>
	<p><b>People</b></p>	<p>The general assessment of a nation's friendliness is measured by whether respondents would feel welcome when visiting the country. Additionally, we measure the appeal of the people on a personal level – whether respondents would 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 impressions they have of the people in each country.</p>
	<p><b>Tourism</b></p>	<p>Respondents rate a country's tourism appeal in three major areas: Natural beauty, historic buildings and monuments, and vibrancy of urban life and attractions. Tourism potential is also rated: How likely a respondent would be to visit a country if money were not an object, and whether the likely experience would be represented by adjectives such as romantic, stressful or spiritual.</p>
	<p><b>Immigration &amp; Investment</b></p>	<p>Lastly, a country's power to attract talent and capital is measured not only by whether people would consider studying, working, or living in that country, but also by perceptions of the country's economic prosperity, equality of opportunity, and ultimately whether it is perceived to be a place with a high quality of life. Perceptions of the country's economic and business conditions – whether stagnant, declining, developing or forward-thinking – complete the measurement of this aspect.</p>
	<p><b>NBI Score</b></p>	<p>The NBI score is an average of the scores from the six Indices mentioned above. There are between three and five rating questions for each of the Indices. Ratings are based on a scale from 1 to 7, with 7 being the highest or best, 1 being the lowest or worst, and 4 being the middle position which is neither positive nor negative. Each section also contains a word choice question which helps contextualize the understanding of the perceptions of a nation's image.</p>

# Understanding key driver analysis

**Key driver analysis (KDA) is a term for statistical analysis that examines the derived importance between potential drivers and behavior (outcome metric) such as overall satisfaction or likelihood of a positive recommendation.**



## *Outcome metric*

The outcome metric is the term used for key questions. Usually, it is the overall satisfaction or loyalty question.

In this case: 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.

Please state how far you agree with the following sentence: "This country has businesses I'd like to invest in."



## *Potential drivers*

Potential Driver is the term used for performance rating questions which you think influence your outcome metric.

In this case: rate aspects of a nation, such as its natural beauty, willingness to work and live in a country for a substantial period of time, wanting a close friend from this place, etc.



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# ***NBI 2022 Findings***

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*Anholt-Ipsos Nation Brands Index<sup>SM</sup>*





# NBI 2022 topline findings



Germany ranks in first for the eighth time overall and sixth time in a row, officially breaking the record for most NBI #1 rankings (previously held by the United States).

- Japan and Canada round out the top-3 NBI nations.



The United Kingdom falls out of the top-5 for the first time in NBI history.



Italy (#4), Switzerland (#7), the United States (#8), Sweden (#9), and Australia (#10) all retain their top-10 rankings from 2021, despite above average declines in score.



Russia drops 31 spots from 2021 to 2022, now in 58<sup>th</sup> place.



Overall desire to visit NBI nations has decreased in 2022 after a large 2021 increase.



Desire to invest in NBI nations has declined to the lowest levels seen since 2016.

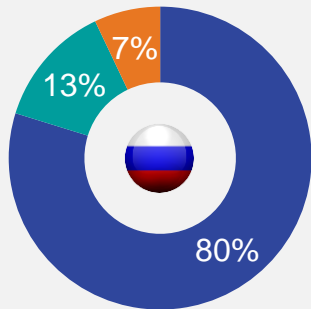
# NBI 2022 60 NBI nation rankings

2021 Rank	2022 Rank	Nation	2021 Rank	2022 Rank	Nation	2021 Rank	2022 Rank	Nation	2021 Rank	2022 Rank	Nation	2021 Rank	2022 Rank	Nation	2021 Rank	2022 Rank	Nation
1	1	Germany	11	11	Spain	20	21	Iceland	35	31	Mexico	44	41	South Africa	-	51	Vietnam
3	2	Japan	12	12	Norway	22	22	Wales	32	32	Hungary	42	42	Morocco	53	52	Ecuador
2	3	Canada	13	13	Netherlands	23	23	South Korea	31	33	China	45	43	Latvia	50	53	Qatar
4	4	Italy	14	14	New Zealand	24	24	Northern Ireland	34	34	Thailand	47	44	Israel	52	54	Colombia
6	5	France	17	15	Scotland	25	25	Singapore	36	35	Egypt	43	45	Indonesia	56	55	Kenya
5	6	United Kingdom	16	16	Austria	26	26	Poland	38	36	Turkey	45	46	United Arab Emirates	57	56	Tanzania
7	7	Switzerland	15	16	Finland	28	27	Brazil	37	37	Slovakia	48	47	Ukraine	55	57	Saudi Arabia
8	8	United States	19	18	Ireland	30	28	Czech Republic	40	38	Peru	-	48	Serbia	27	58	Russia
9	9	Sweden	18	19	Belgium	29	29	Argentina	40	39	India	51	49	Panama	58	59	Botswana
10	10	Australia	21	20	Greece	33	30	Taiwan	39	40	Chile	49	50	Dominican Republic	60	60	Palestine

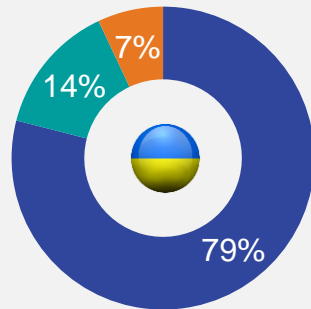
# News awareness

The average awareness of news about a nation is 33%. The top-3 countries that global citizens have seen, read, or heard about in the past 6 months are Russia (80%), Ukraine (79%), and the United States (76%).

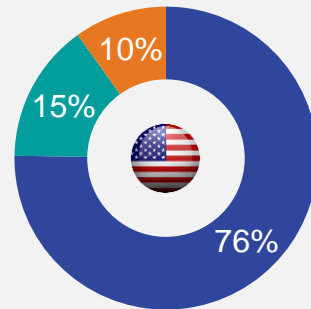
High Awareness



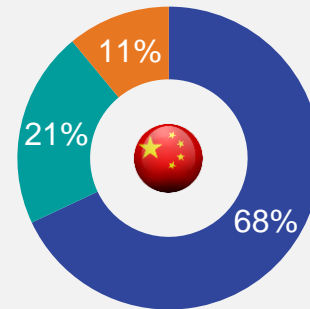
Russia



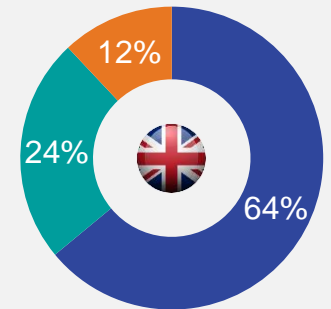
Ukraine



U.S.A.

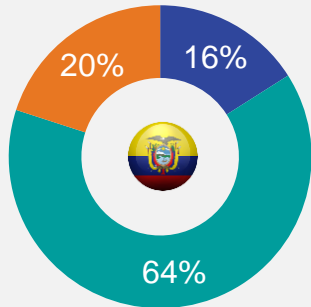


China

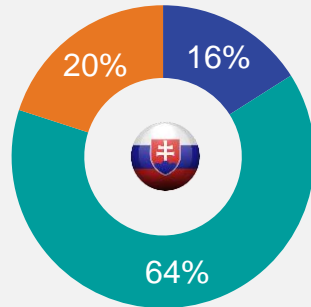


UK

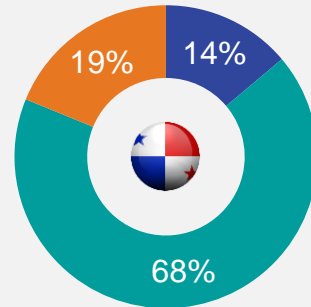
Low Awareness



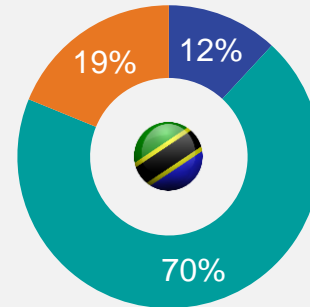
Ecuador



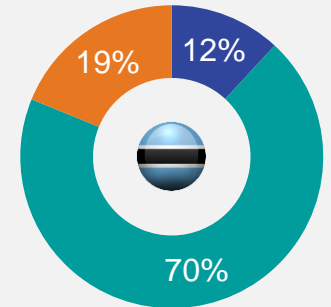
Slovakia



Panama



Tanzania



Botswana

■ Aware ■ Unaware ■ Not Sure

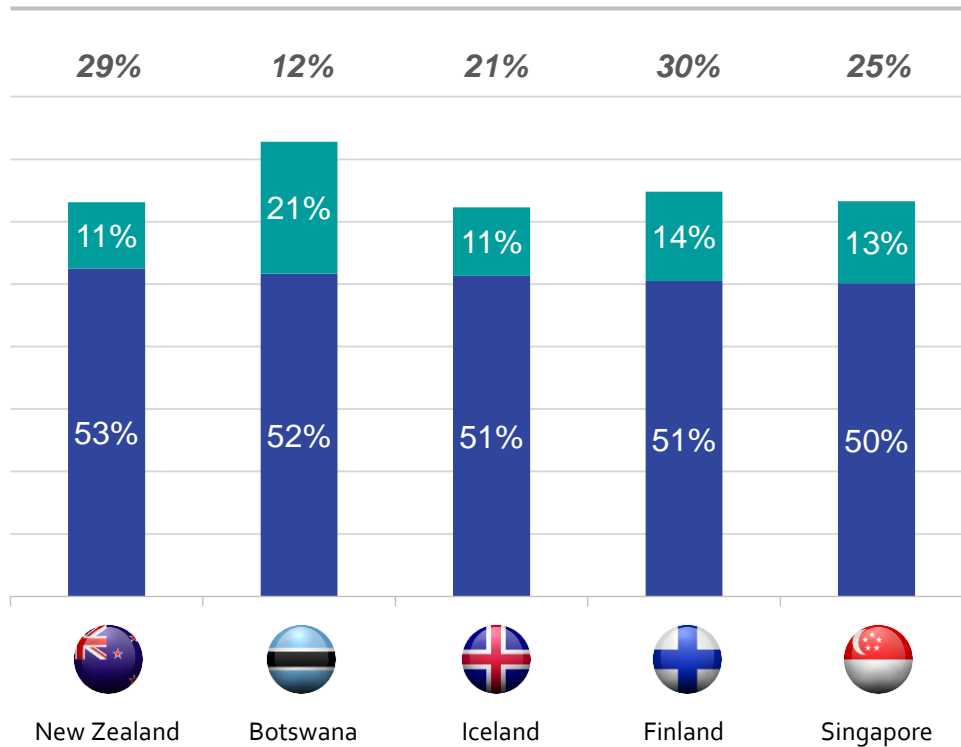
# News awareness impact scores

Russia in particular is saddled by negative media with a net impact score (positive news impact minus negative news impact) of -56%.

## Highest News Favorability

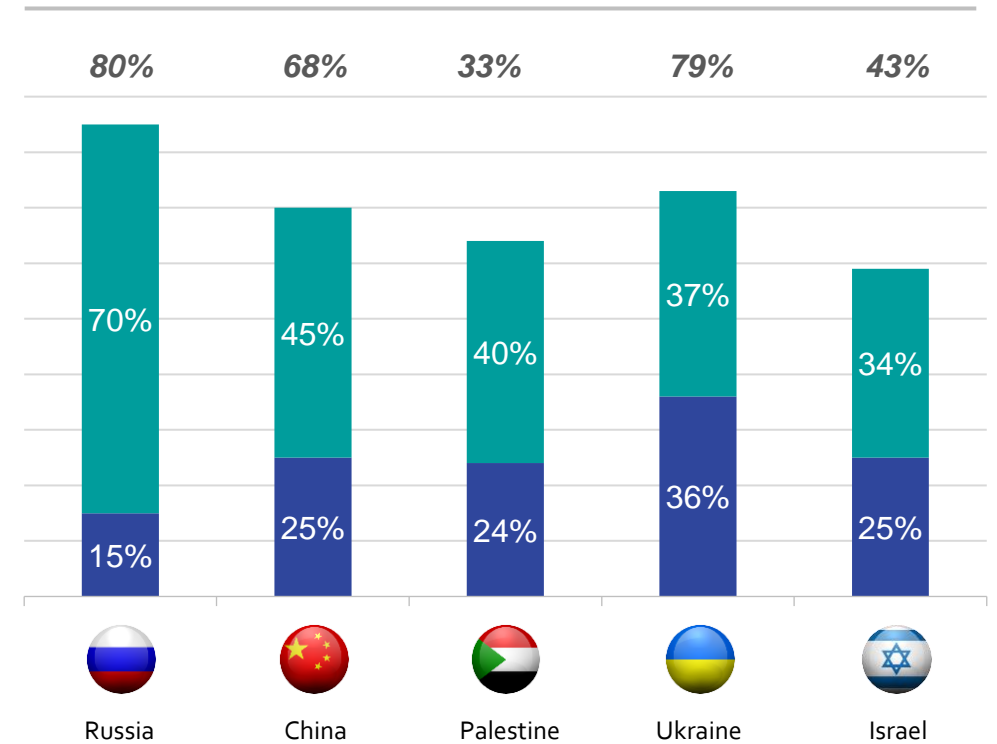
Based on those who have seen / read / heard news

News Awareness %



## Lowest News Favorability

Based on those who have seen / read / heard news



■ Favorable ■ Unfavorable

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## *Desire to Visit Key Driver Analysis*

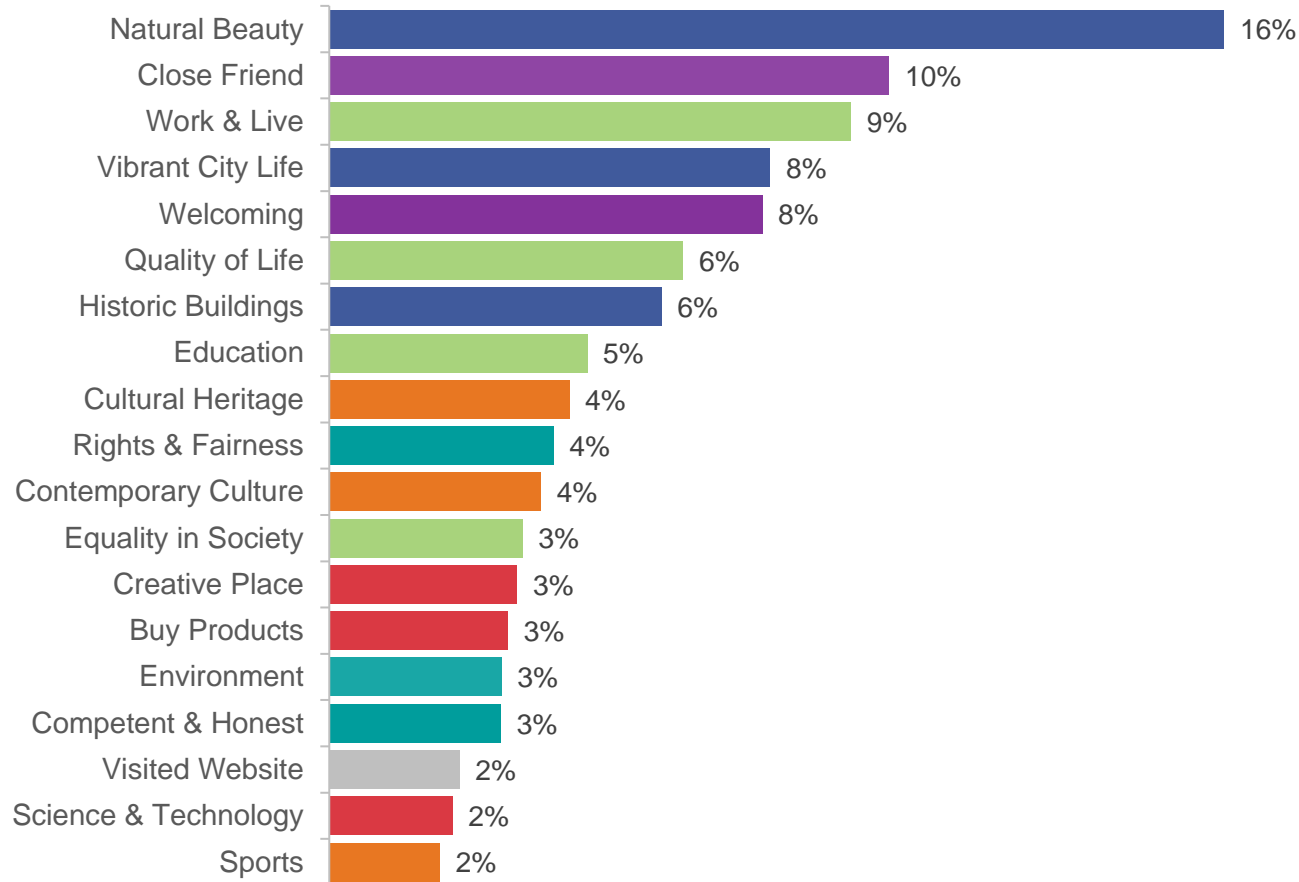
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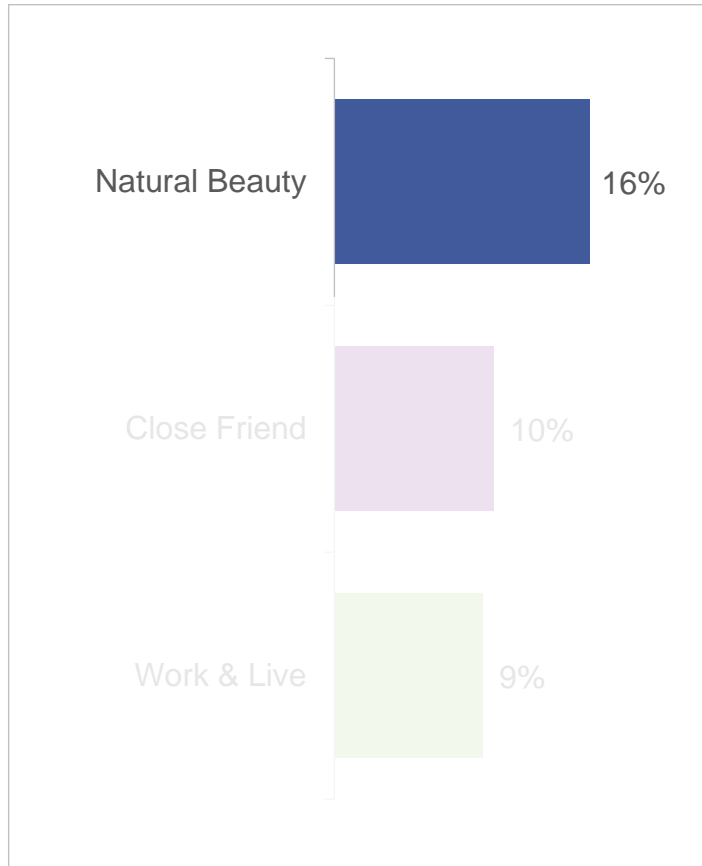
# Global Desire to Visit Drivers

The Top-3 drivers of desire to visit a nation come from the Tourism, People, and Immigration and Investment Indices.

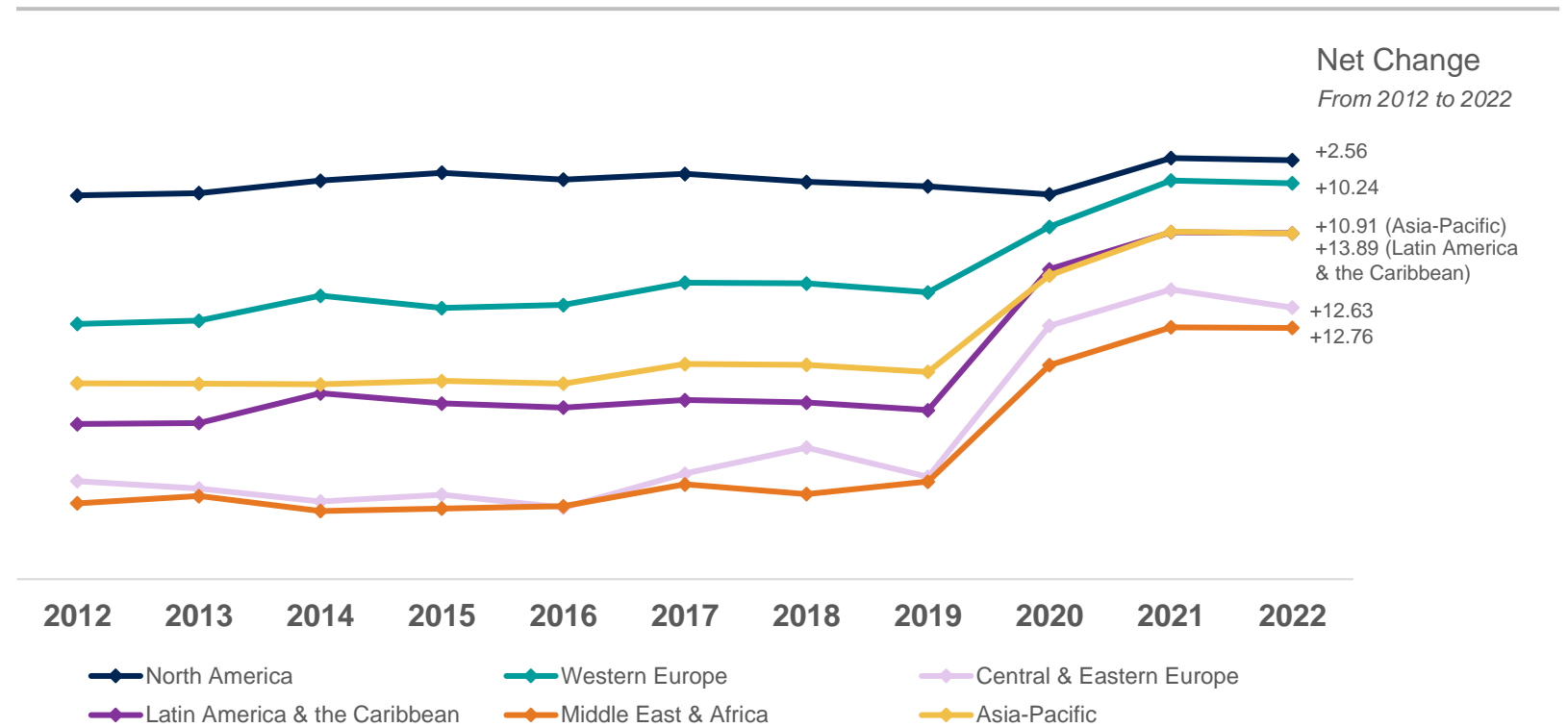


# Driver time-series

Latin America & the Caribbean and the Middle East & Africa have seen the largest net change in score on natural beauty.

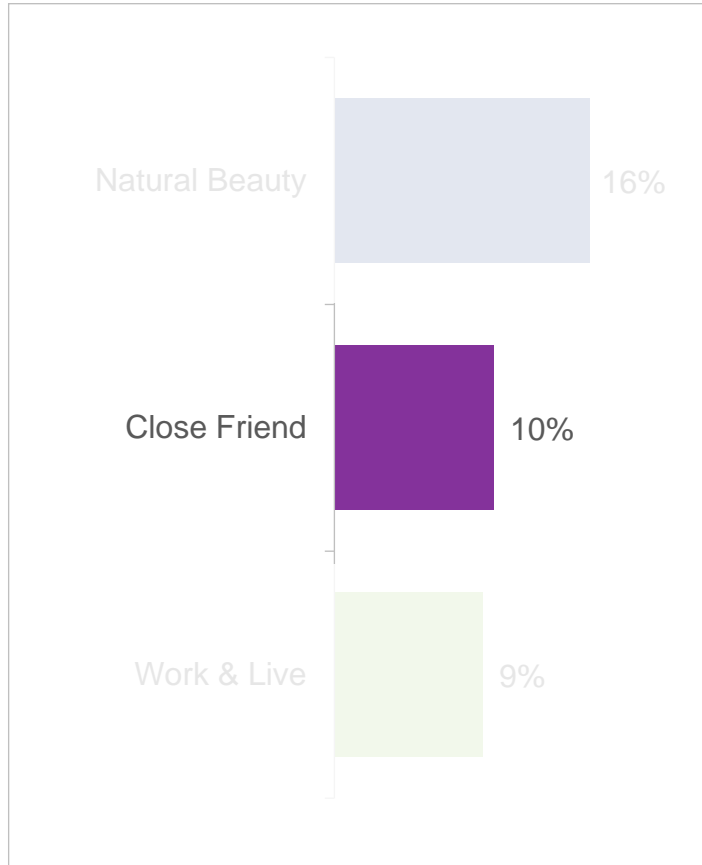


Regional Average Performance

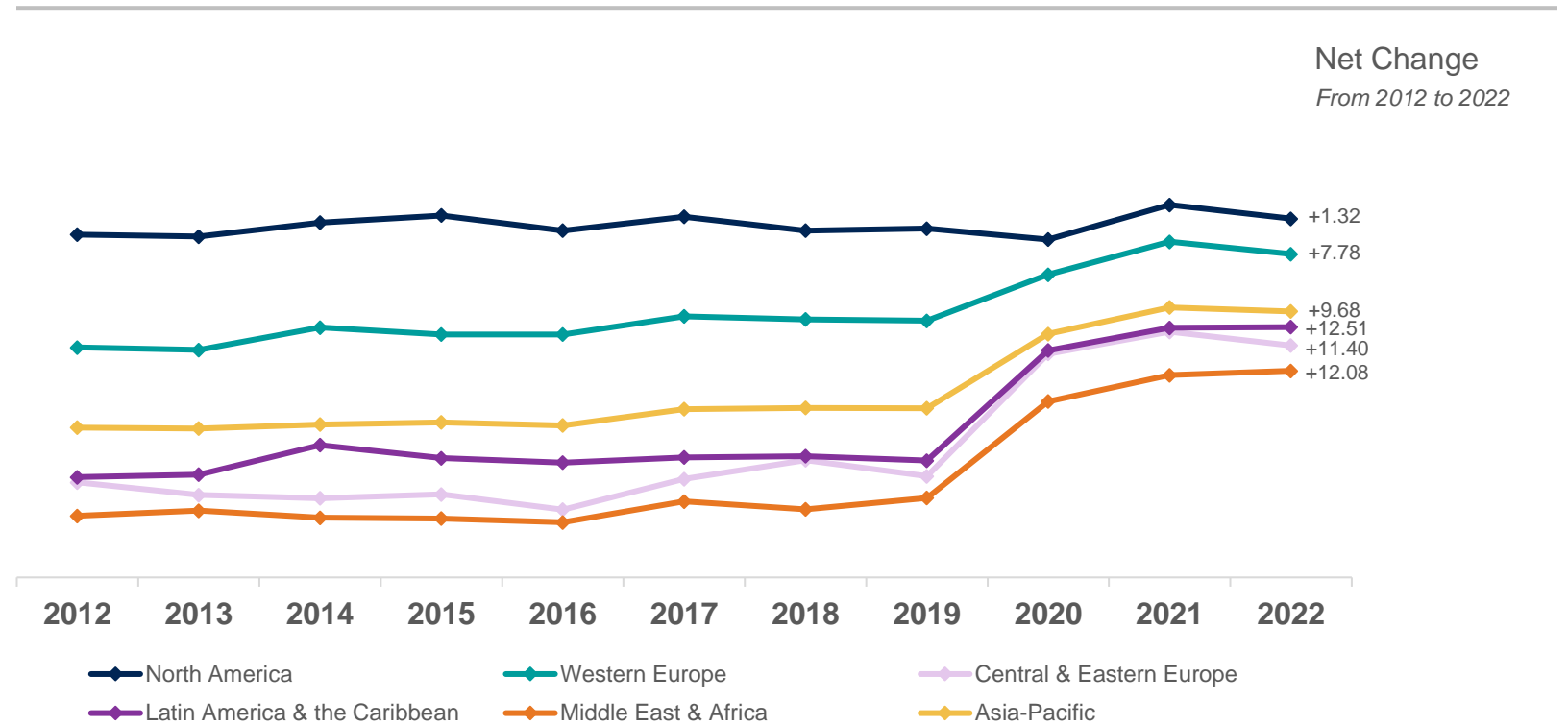


# Driver time-series

Latin America & the Caribbean has seen the largest positive net change on wanting a close friend from the region in the past decade with +12.08 points. North America sees the smallest change with just over a point difference from 2012.



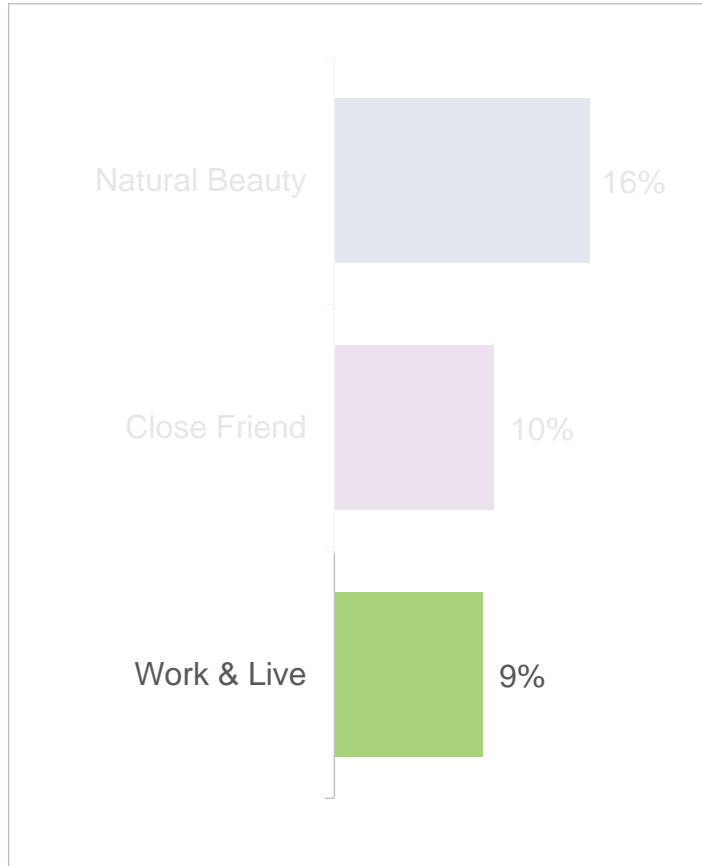
Regional Average Performance



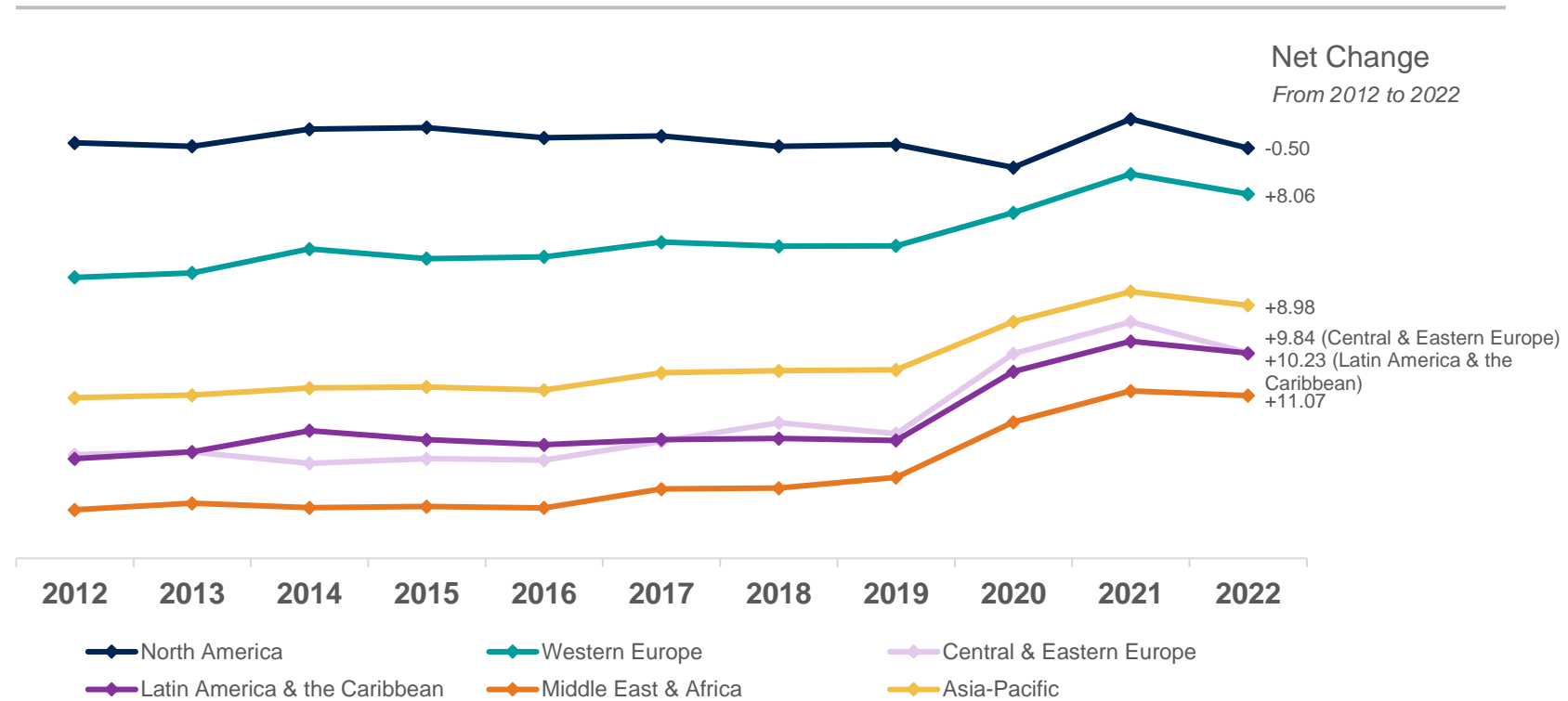


# Driver time-series

North America is the only region to see a decrease in performance on willingness to work and live in the region for a substantial period of time since 2012.



Regional Average Performance



d

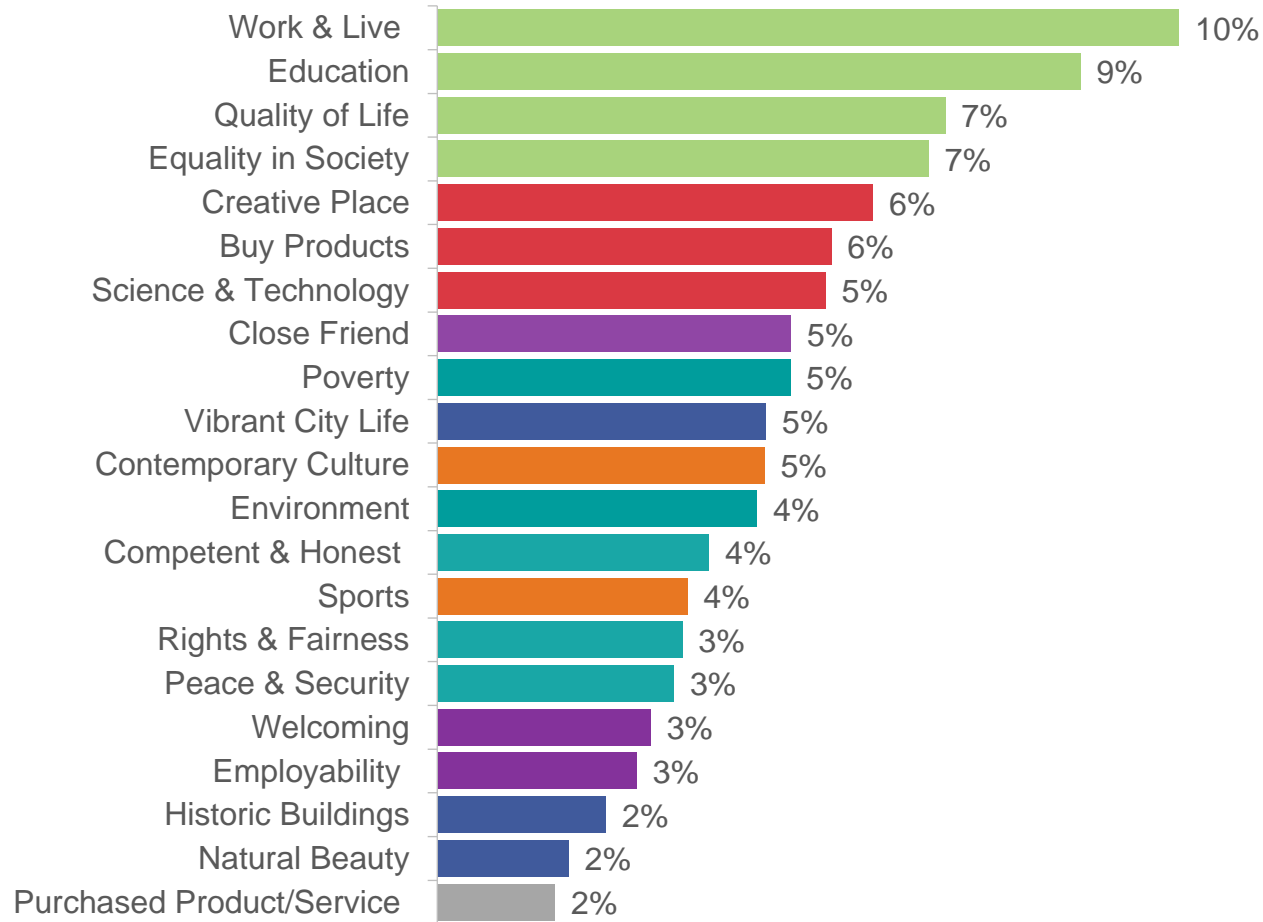
# ***Desire to Invest Key Driver Analysis***

*Anholt-Ipsos Nation Brands Index<sup>SM</sup>*



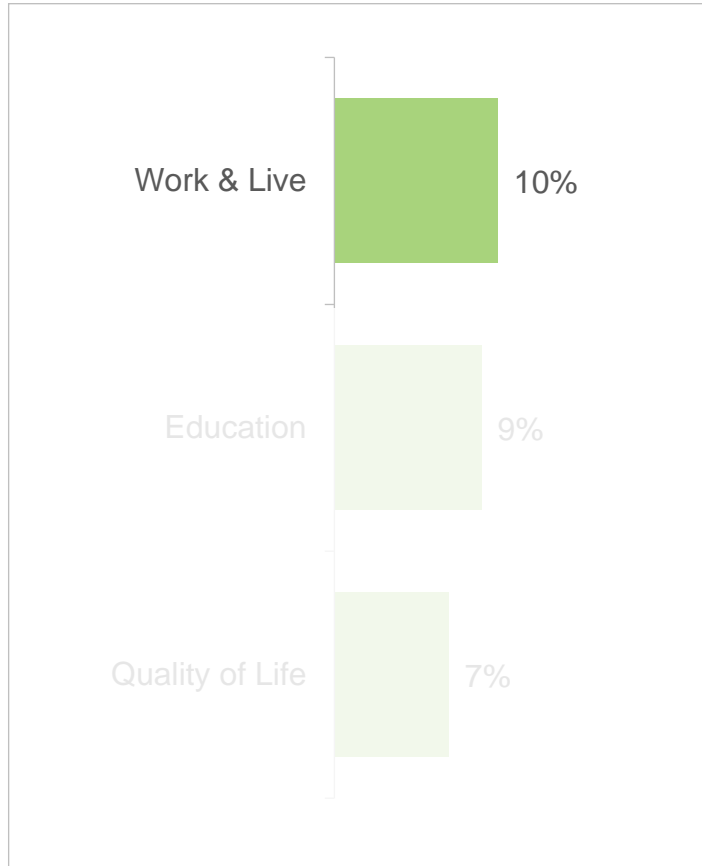
# Global Desire to Invest

The top-4 drivers of desire to invest in a nation all come from the Immigration & Investment Index.

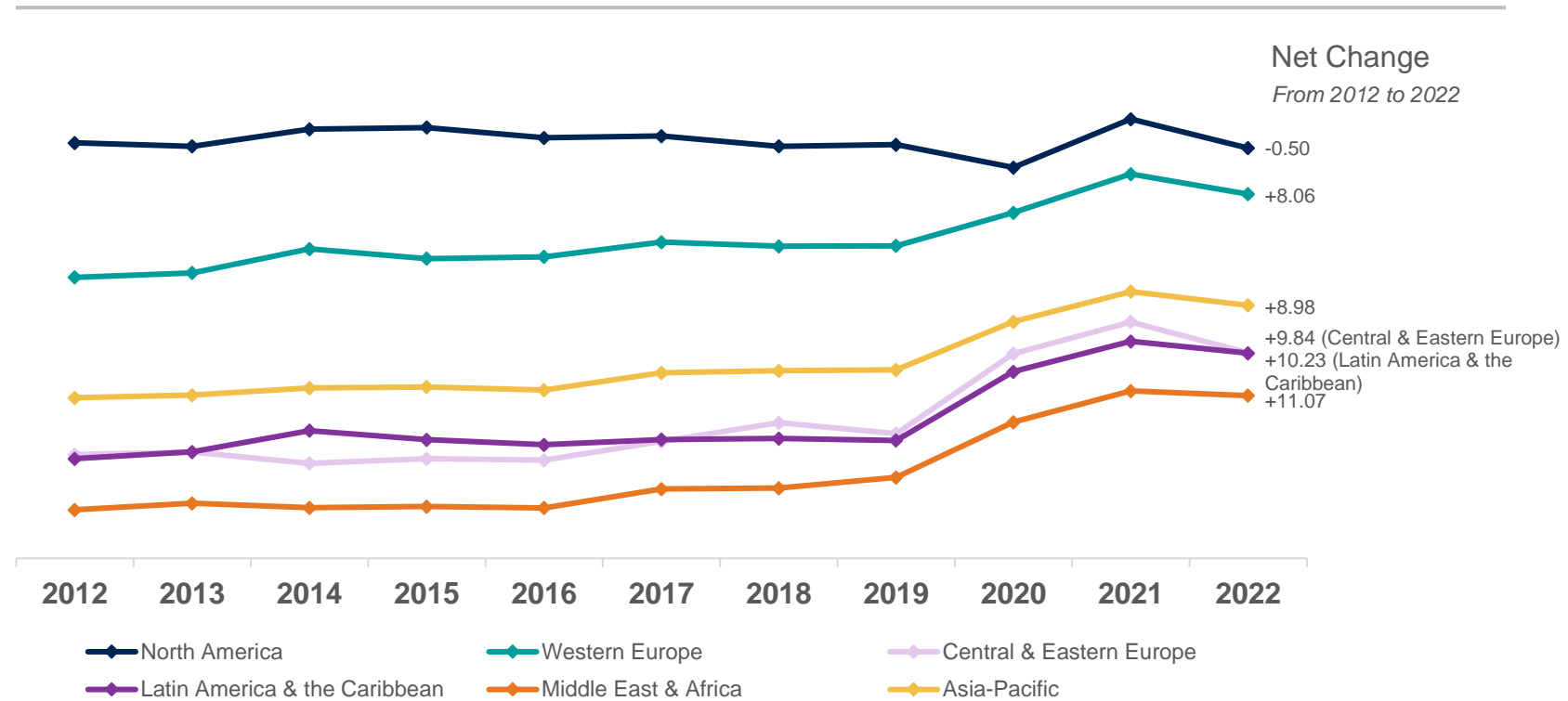


# Driver Time-Series

The Middle East & Africa see the largest increase in willingness to work and live in their region in the past decade with +11.07 points.

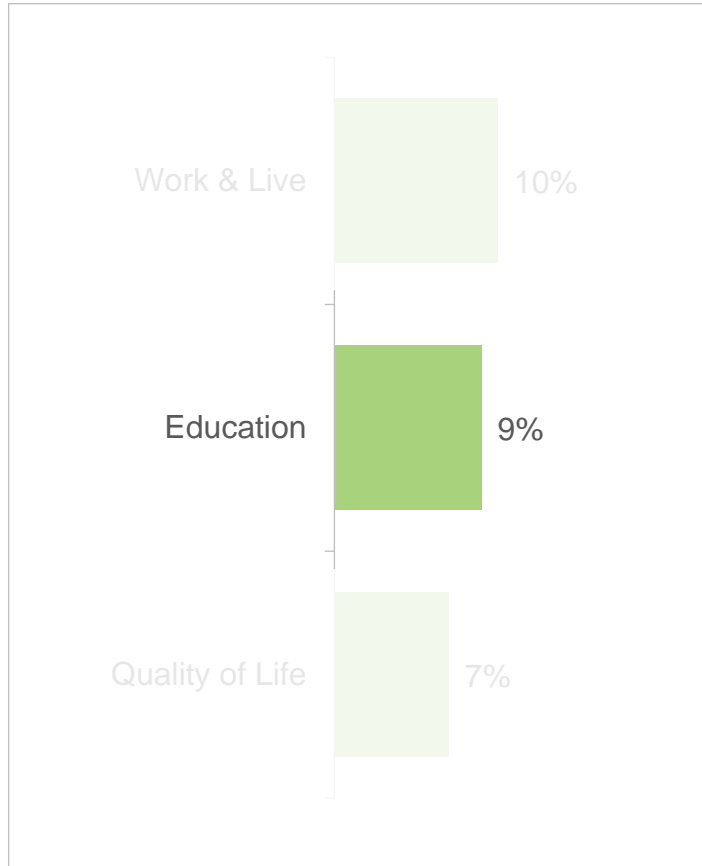


Regional Average Performance

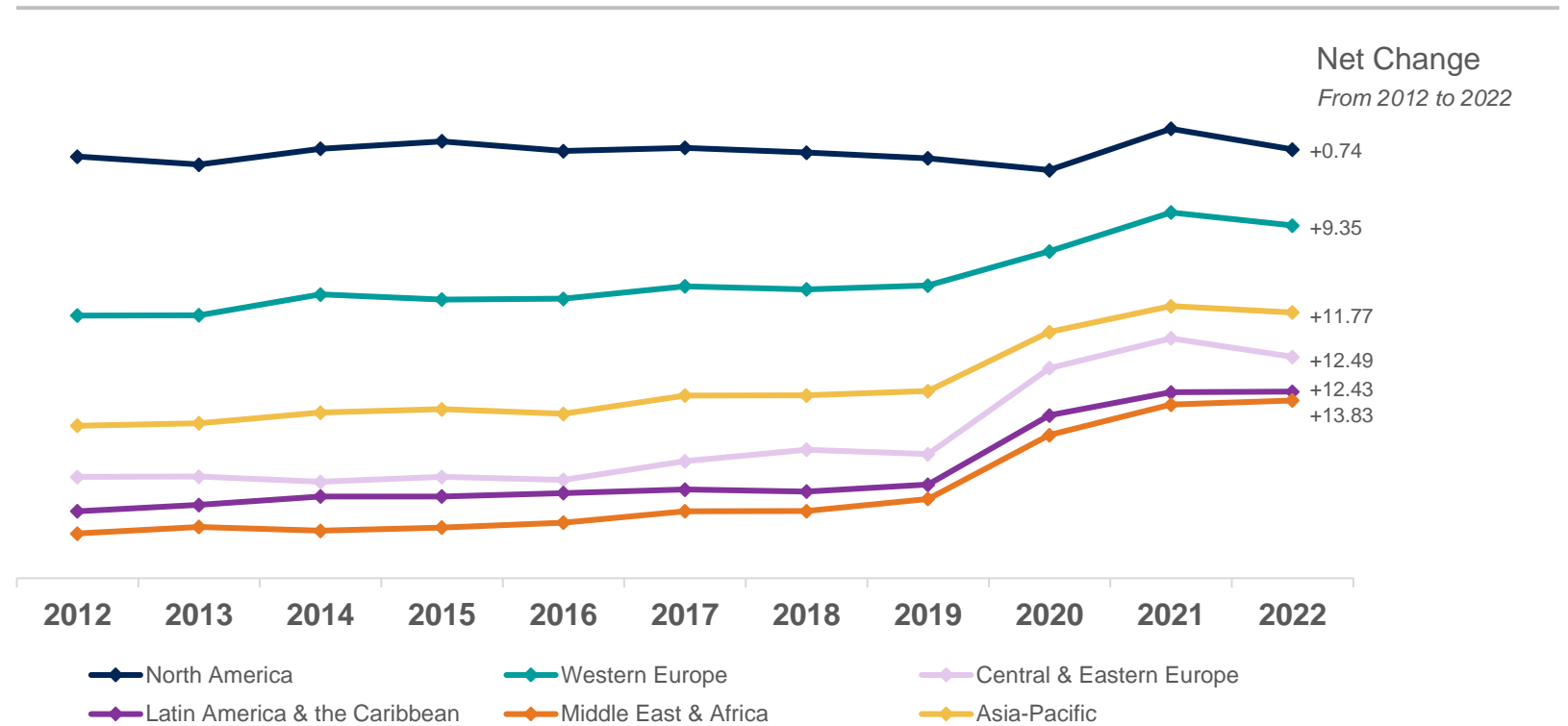


# Driver Time-Series

The Middle East & Africa's and Central & Eastern Europe's performances on Education has grown the most in the past decade. North America sees the smallest increase with just under a point difference.

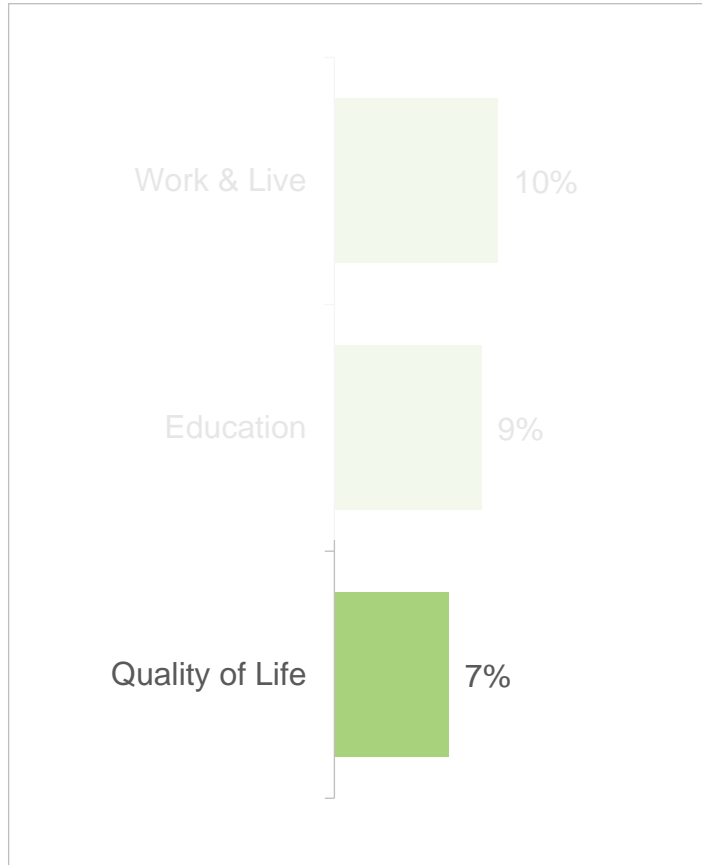


Regional Average Performance

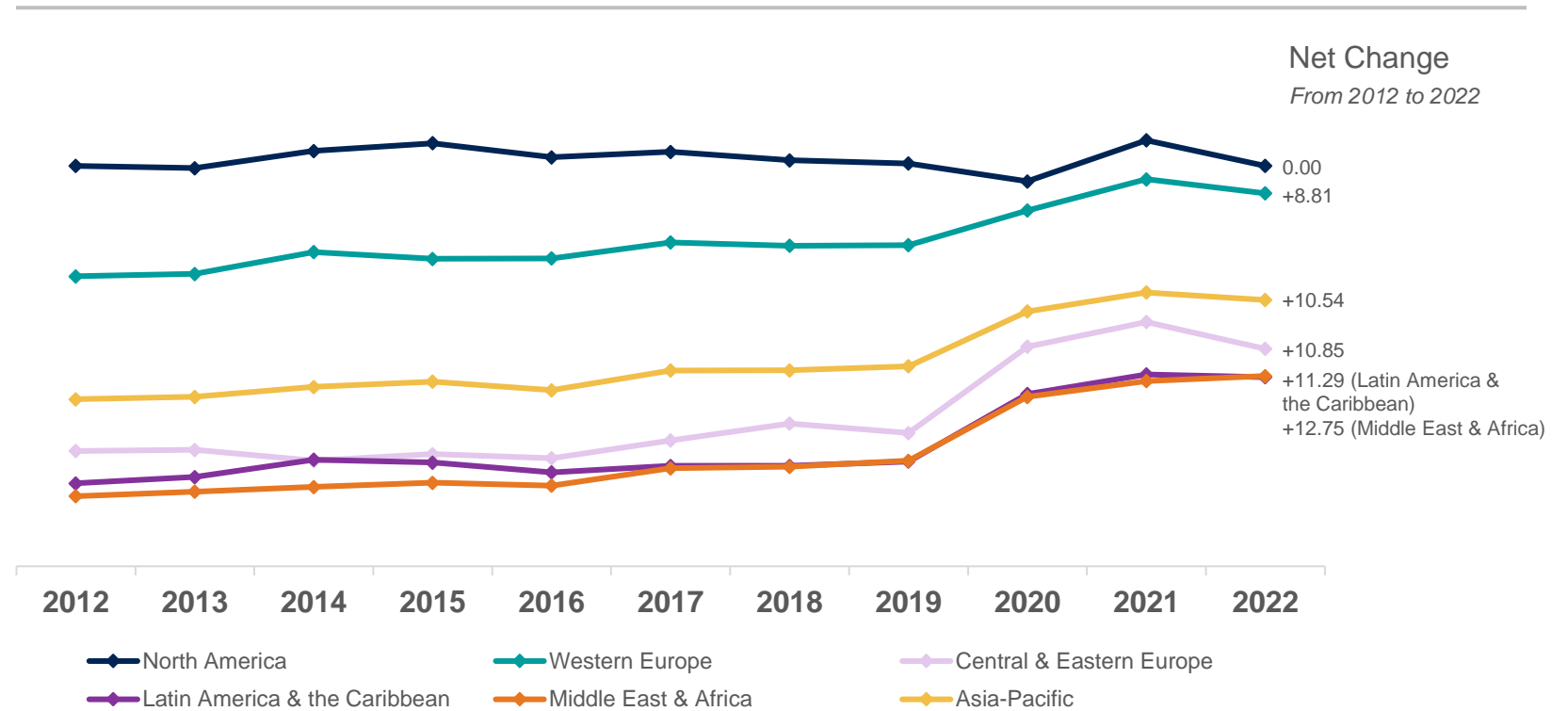


# Driver Time-Series

North America has the same performance score in 2022 that it had in 2012 on its region's quality of life.



Regional Average Performance



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# Summary

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# Performance on top key drivers for desire to visit and invest have generally improved since 2012.



The top drivers for desire to visit come from the Tourism, People, and Immigration and Investment Indices. Attributes on the Immigration and Investment Index are the top drivers for desire to invest in a nation.



The North American region leads on all top key drivers for desire to visit and invest.

- Western Europe generally trails North America, with Asia-Pacific following. Latin America & the Caribbean, Central & Eastern Europe, and the Middle East & Africa fall to the bottom of the pack.
- Despite leading on all top drivers, the North American region has seen the smallest increase on attribute performance compared to other regions.



Performance on top key drivers across all regions have improved since 2012, particularly for the Latin America & the Caribbean, Central & Eastern Europe, and Middle East & Africa regions.

- The only exception is North America's 0.00 net change on Quality of Life.



# For more information

For more information on the Nation Brands Index or your country's performance, please contact

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# *Appendix*

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*Anholt-Ipsos Nation Brands Index<sup>SM</sup>*



# Attribute Key



## Full Attribute



## Shortened Attribute

This country makes a major contribution to innovation in science and technology	Science & Technology
Buying products made in this country	Buy Products
This country is a creative place with cutting-edge ideas and new ways of thinking	Creative Place
This country is competently and honestly governed	Competent and Honest
This country respects the rights of its citizens and treats them with fairness	Rights & Fairness
This country behaves responsibly to protect the environment	Environment
This country excels at sport	Sports
This country has a rich cultural heritage	Cultural Heritage
This country is an interesting and exciting place for contemporary culture such as music, films, art and literature	Contemporary Culture
If I visited this country, the people would make me feel very welcome	Welcoming
I would like to have a person from this country as a close friend	Close Friend
This country is rich in natural beauty	Natural Beauty
This country is rich in historic buildings and monuments	Historic Buildings
This country has a vibrant city life and urban attractions	Vibrant City Life
Willing to live and work for a substantial period in this country	Work & Live
This country is a place with a high quality of life	Quality of Life
This country is a good place to study for educational qualifications	Education
This country cares about equality in society	Equality in Society
I have visited a website or social networking site from or about this country	Visited Website
This country behaves responsibly in the areas of international peace and security	Peace & Security
This country behaves responsibly to help reduce world poverty	Poverty
How willing would you be to consider a well-qualified person from the following country?	Employability
I have purchased a product or service from this country	Purchased Product/Service

# About Ipsos

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Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP [www.ipsos.com](http://www.ipsos.com)



# About Simon Anholt

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Simon Anholt designed and launched the Nation Brands Index in 2005. Since 1998, he has advised the presidents, prime ministers and governments of 63 countries, helping them to engage more imaginatively and effectively with the international community. He is recognized as the world's leading authority on national image. Professor Anholt also publishes the Good Country Index, a survey that ranks countries on their contribution to humanity and the planet, and is Founder-Editor Emeritus of the Journal of Place Branding and Public Diplomacy. He was previously Vice-Chair of the UK Foreign Office Public Diplomacy Board. Anholt's TED talk launching the Good Country Index has received 12 million views, and is the all-time most viewed TED talk on 'governance'. He has written six books about countries, cultures and globalization and is an honorary Professor of Political Science at the University of East Anglia. His latest book, *The Good Country Equation*, was published in August 2020.