# The Anholt-Ipsos Nation Brands Index℠

*November 2022*
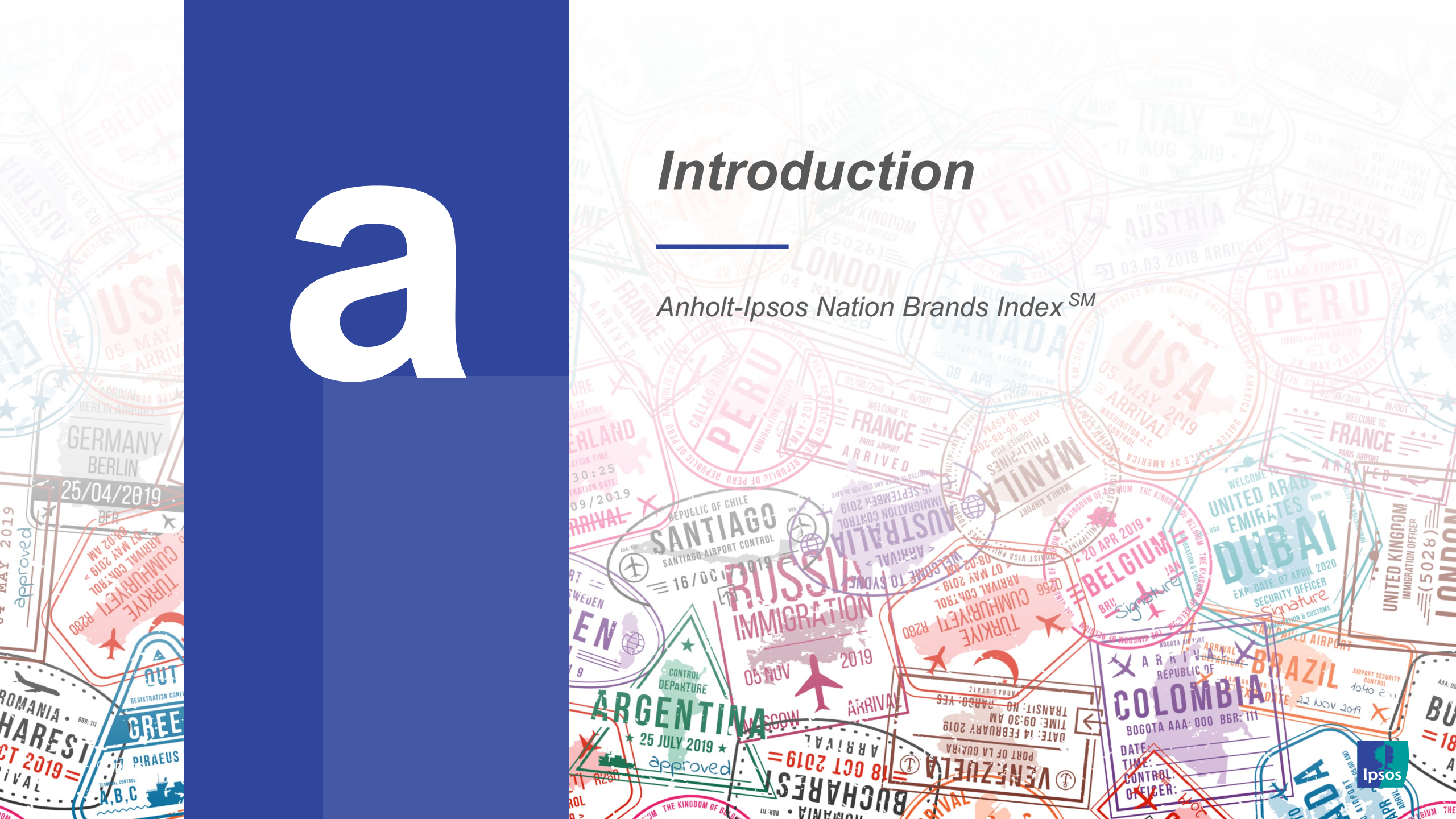
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# *Introduction*

*Anholt-Ipsos Nation Brands Index* [SM]

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# 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.
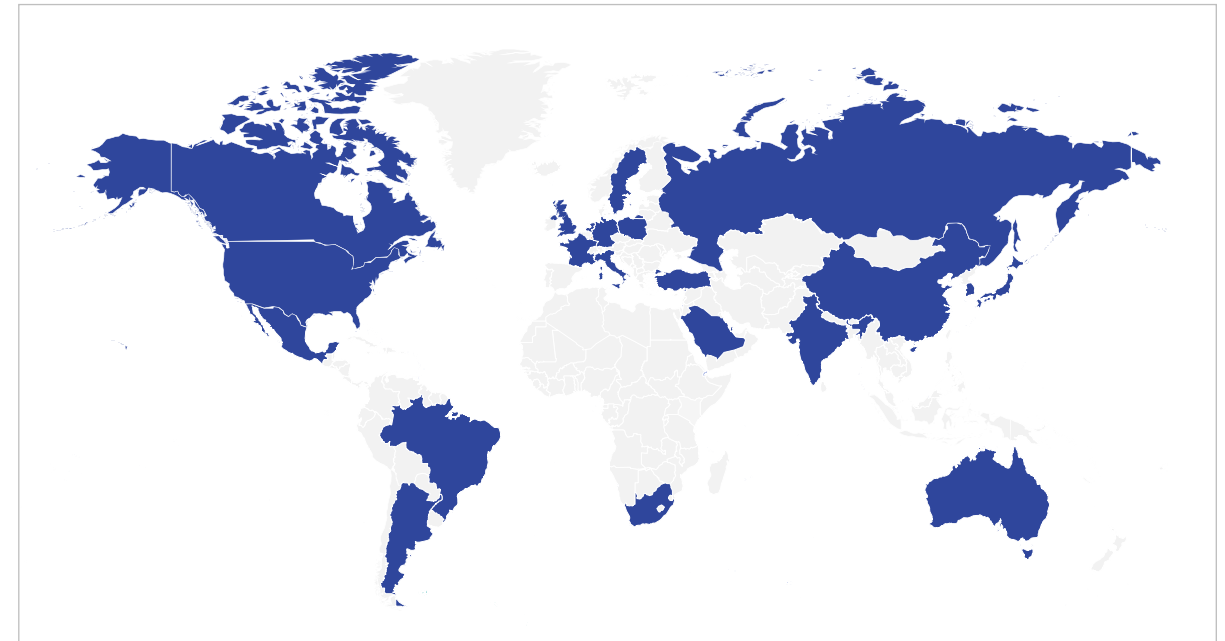
## The core 20 panel countries:

**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.

**Western Europe**

The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Netherlands, Switzerland, Finland, Austria, Greece, Belgium, Northern Ireland, Norway, Iceland, Wales

**North America**

The U.S., Canada

**Central/Eastern Europe**

Russia, Poland, Czech Republic, Hungary, Turkey, Ukraine, Latvia, Slovakia, Serbia

**Latin America & the Caribbean**

Argentina, Brazil, Mexico, Chile, Peru, Colombia, Ecuador, Dominican Republic, Panama

**Middle East/Africa**

United Arab Emirates, Egypt, Saudi Arabia, South Africa, Kenya, Qatar, Palestine, Israel, Morocco, Tanzania, Botswana

**Asia-Pacific**

Japan, South Korea, China, India, Thailand, Indonesia, Singapore, Taiwan, Australia, New Zealand, Vietnam

# 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®.

**Nation Brand**

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

| | | |
|---|---|---|
| 🚩 | **Exports** | 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. |
| 🏛️ | **Governance** | 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. |
| 🏢 | **Culture** | 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." |
| 👤 | **People** | 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. |
| 🖱️ | **Tourism** | 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. |
| 📖 | **Immigration & Investment** | 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. |
| 🌐 | **NBI Score** | 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. |

# 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.

# NBI 2022 Findings

*Anholt-Ipsos Nation Brands Index* [SM]

# 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 58th place.

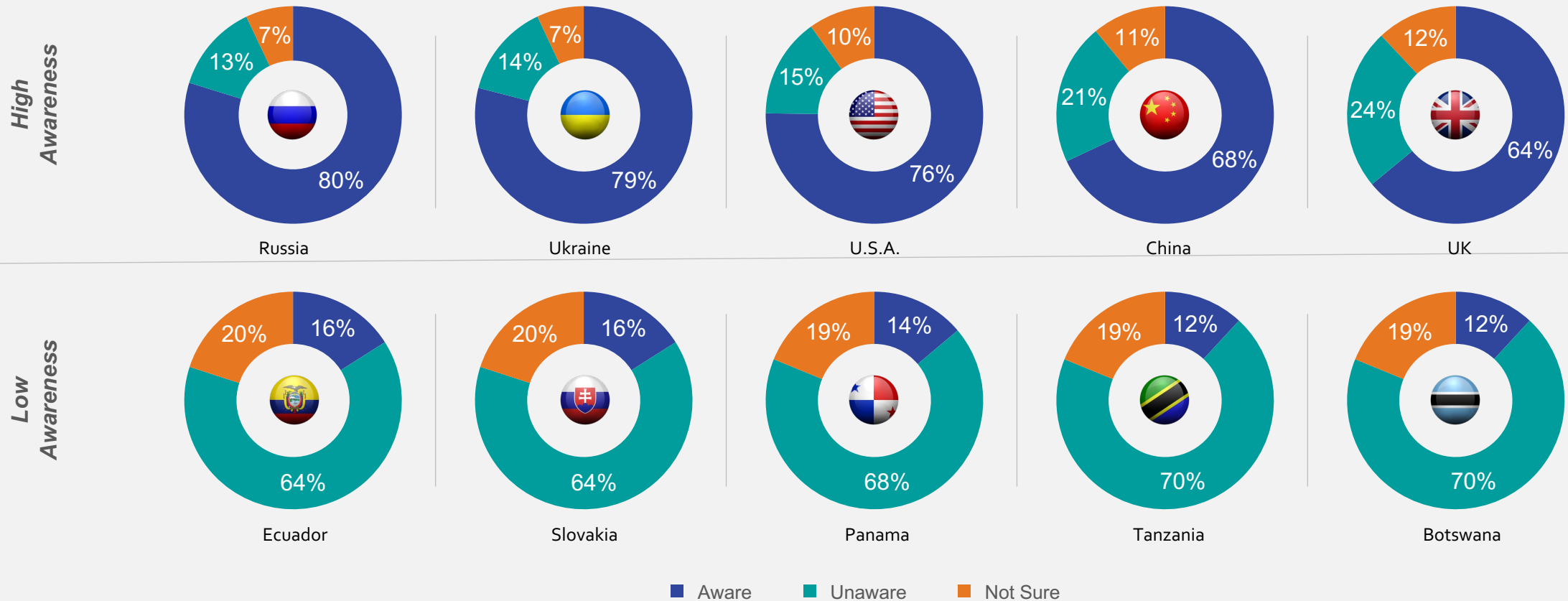Overall desire to visit NBI nations has decreased in 2022 after a large 2021 increase.

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 — 80% Aware, 13% Unaware, 7% Not Sure | Ukraine — 79% Aware, 14% Unaware, 7% Not Sure | U.S.A. — 76% Aware, 15% Unaware, 10% Not Sure | China — 68% Aware, 21% Unaware, 11% Not Sure | UK — 64% Aware, 24% Unaware, 12% Not Sure |

**Low Awareness**

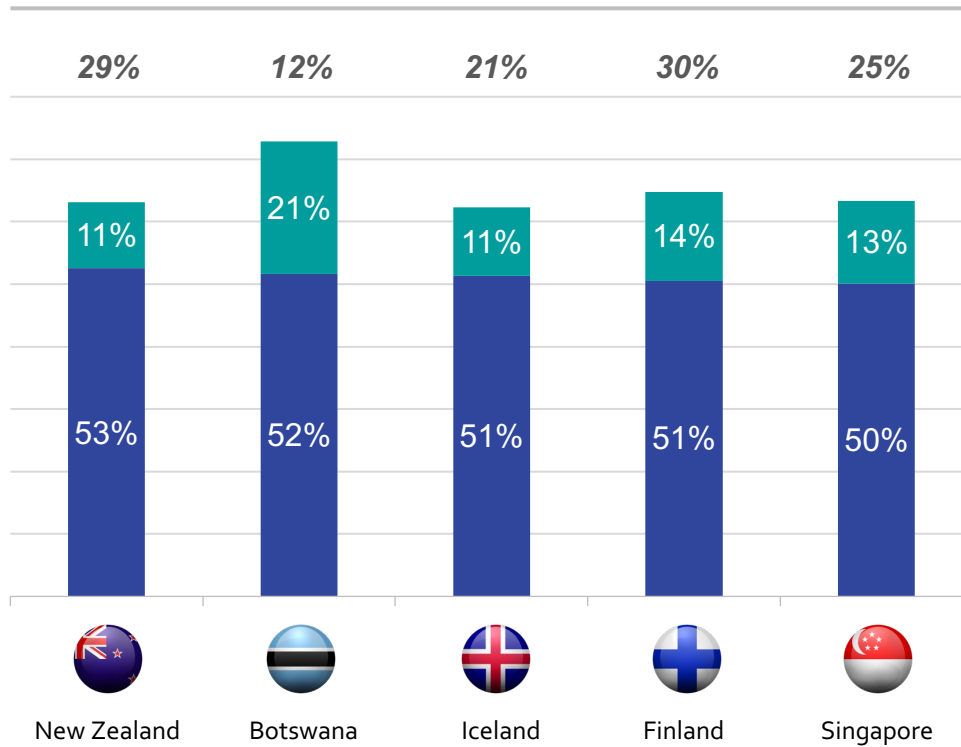| | | | | |
|---|---|---|---|---|
| Ecuador — 16% Aware, 64% Unaware, 20% Not Sure | Slovakia — 16% Aware, 64% Unaware, 20% Not Sure | Panama — 14% Aware, 68% Unaware, 19% Not Sure | Tanzania — 12% Aware, 70% Unaware, 19% Not Sure | Botswana — 12% Aware, 70% Unaware, 19% Not Sure |

■ 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* |

| | *Lowest News Favorability* |
|---|---|
| | *Based on those who have seen / read / heard news* |

**News Awareness %**

| | New Zealand | Botswana | Iceland | Finland | Singapore |
|---|---|---|---|---|---|
| News Awareness % | 29% | 12% | 21% | 30% | 25% |
| Unfavorable | 11% | 21% | 11% | 14% | 13% |
| Favorable | 53% | 52% | 51% | 51% | 50% |

| | Russia | China | Palestine | Ukraine | Israel |
|---|---|---|---|---|---|
| News Awareness % | 80% | 68% | 33% | 79% | 43% |
| Unfavorable | 70% | 45% | 40% | 37% | 34% |
| Favorable | 15% | 25% | 24% | 36% | 25% |
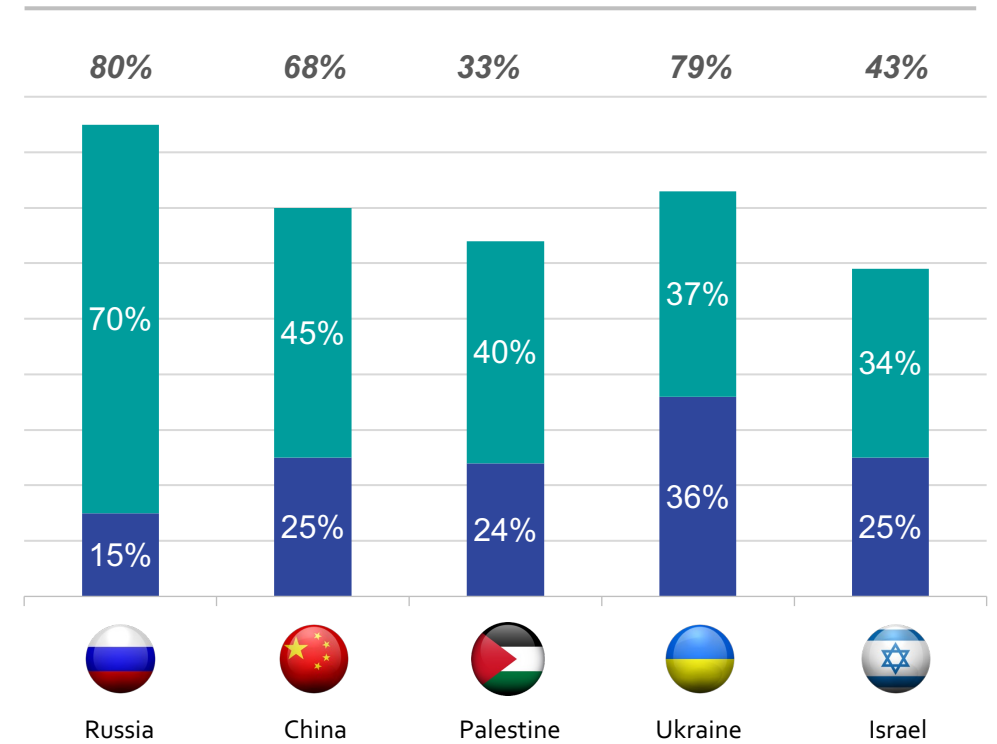
■ Favorable  ■ Unfavorable

Ipsos

# C

## Desire to Visit Key Driver Analysis

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

# 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.**
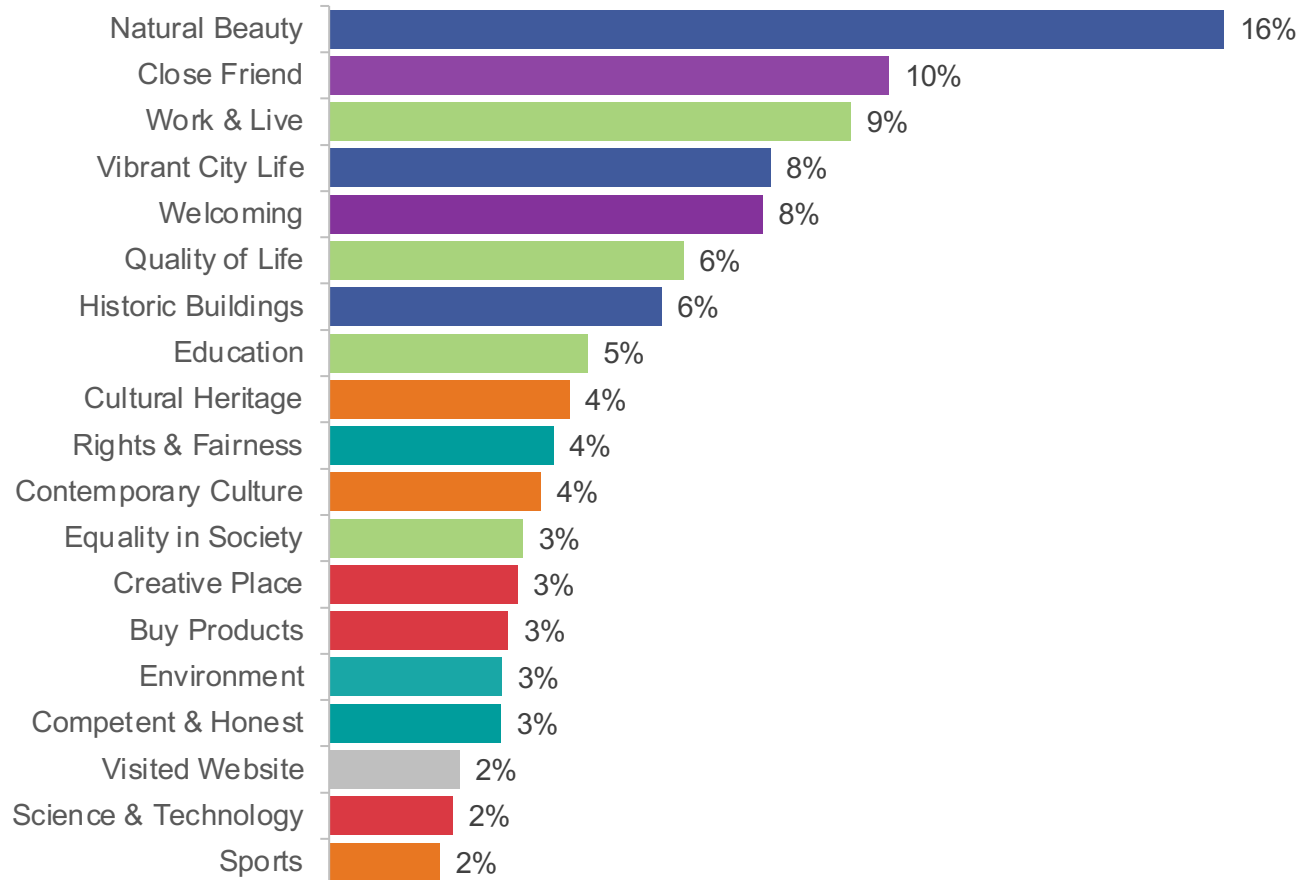
| Driver | Value |
|---|---|
| Natural Beauty | 16% |
| Close Friend | 10% |
| Work & Live | 9% |
| Vibrant City Life | 8% |
| Welcoming | 8% |
| Quality of Life | 6% |
| Historic Buildings | 6% |
| Education | 5% |
| Cultural Heritage | 4% |
| Rights & Fairness | 4% |
| Contemporary Culture | 4% |
| Equality in Society | 3% |
| Creative Place | 3% |
| Buy Products | 3% |
| Environment | 3% |
| Competent & Honest | 3% |
| Visited Website | 2% |
| Science & Technology | 2% |
| Sports | 2% |

Exports

Immigration and Investment

Governance

Nation Brand

Tourism

Culture

People

Ipsos

# Driver time-series

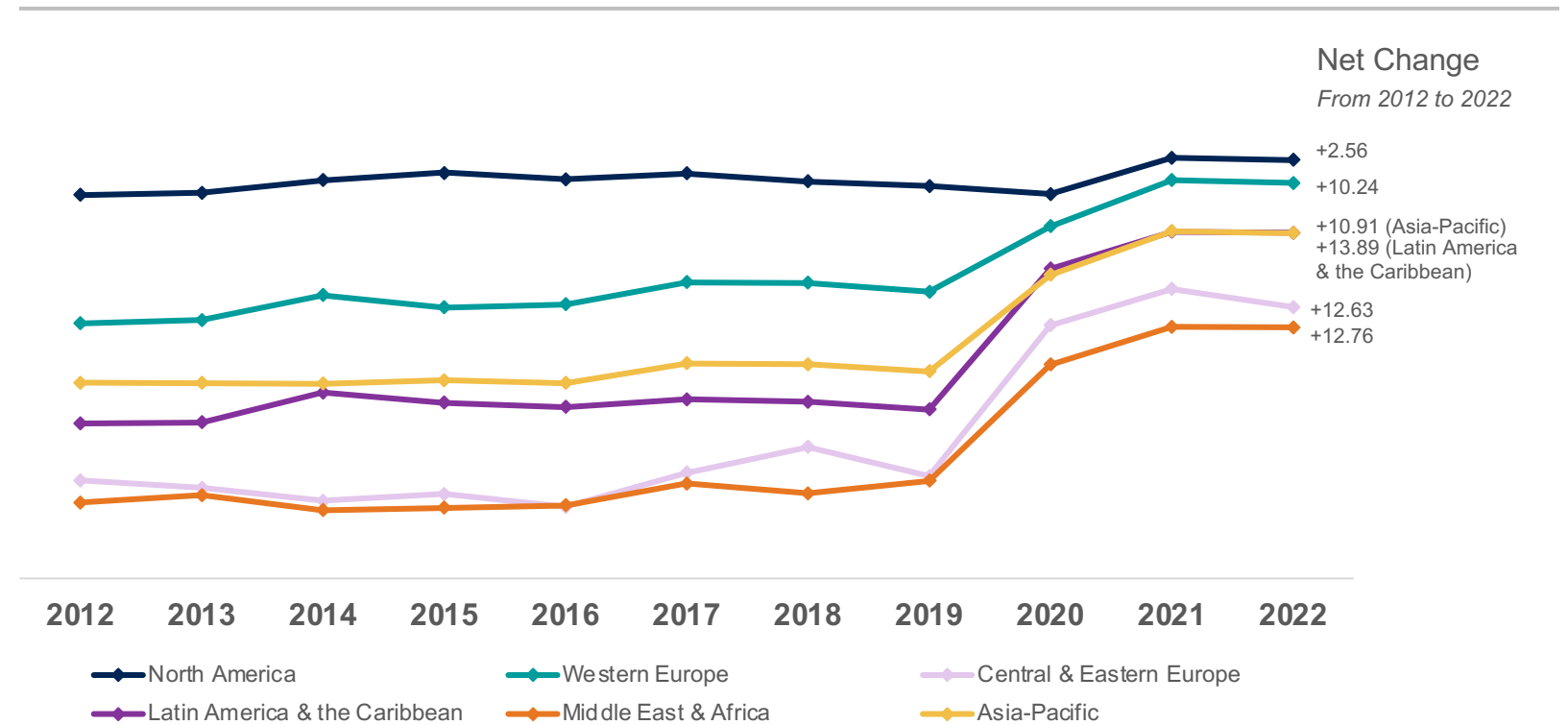## Latin America & the Caribbean and the Middle East & Africa have seen the largest net change in score on natural beauty.

| | |
|---|---|
| Natural Beauty | 16% |
| Close Friend | 10% |
| Work & Live | 9% |

### Regional Average Performance

**Net Change**
*From 2012 to 2022*

+2.56
+10.24
+10.91 (Asia-Pacific)
+13.89 (Latin America & the Caribbean)
+12.63
+12.76

2012  2013  2014  2015  2016  2017  2018  2019  2020  2021  2022

- North America
- Western Europe
- Central & Eastern Europe
- Latin America & the Caribbean
- Middle East & Africa
- Asia-Pacific
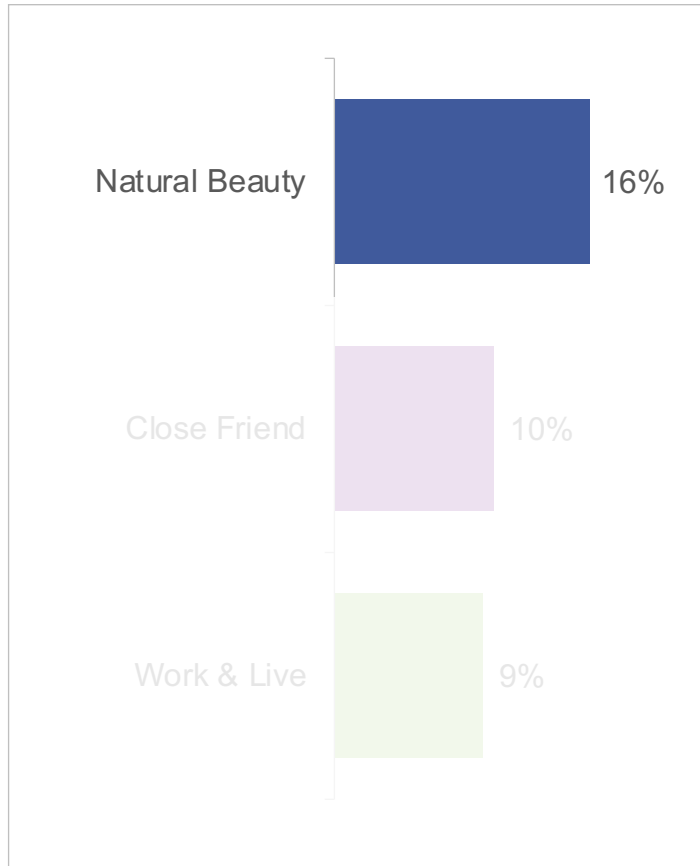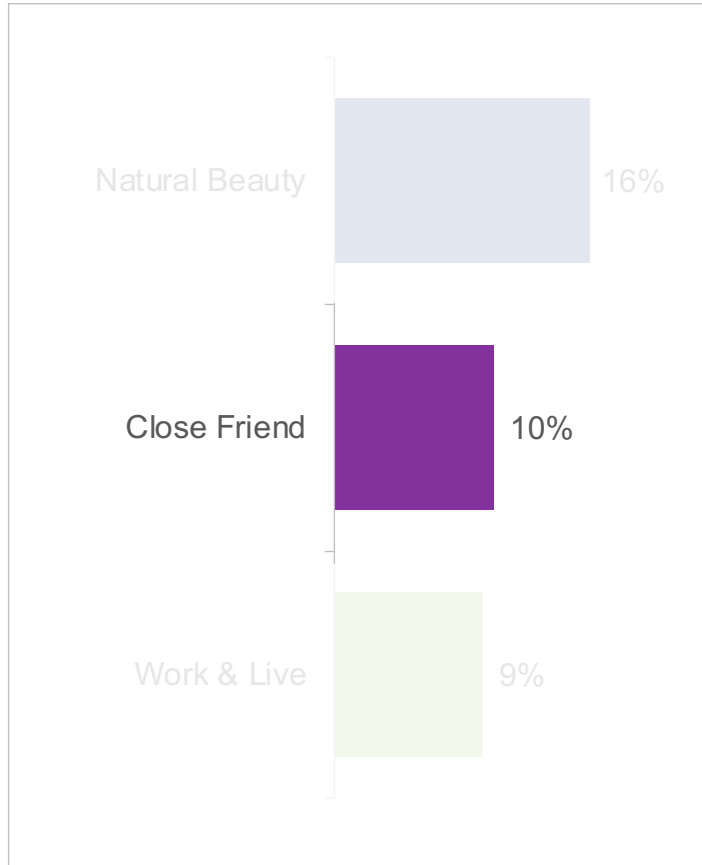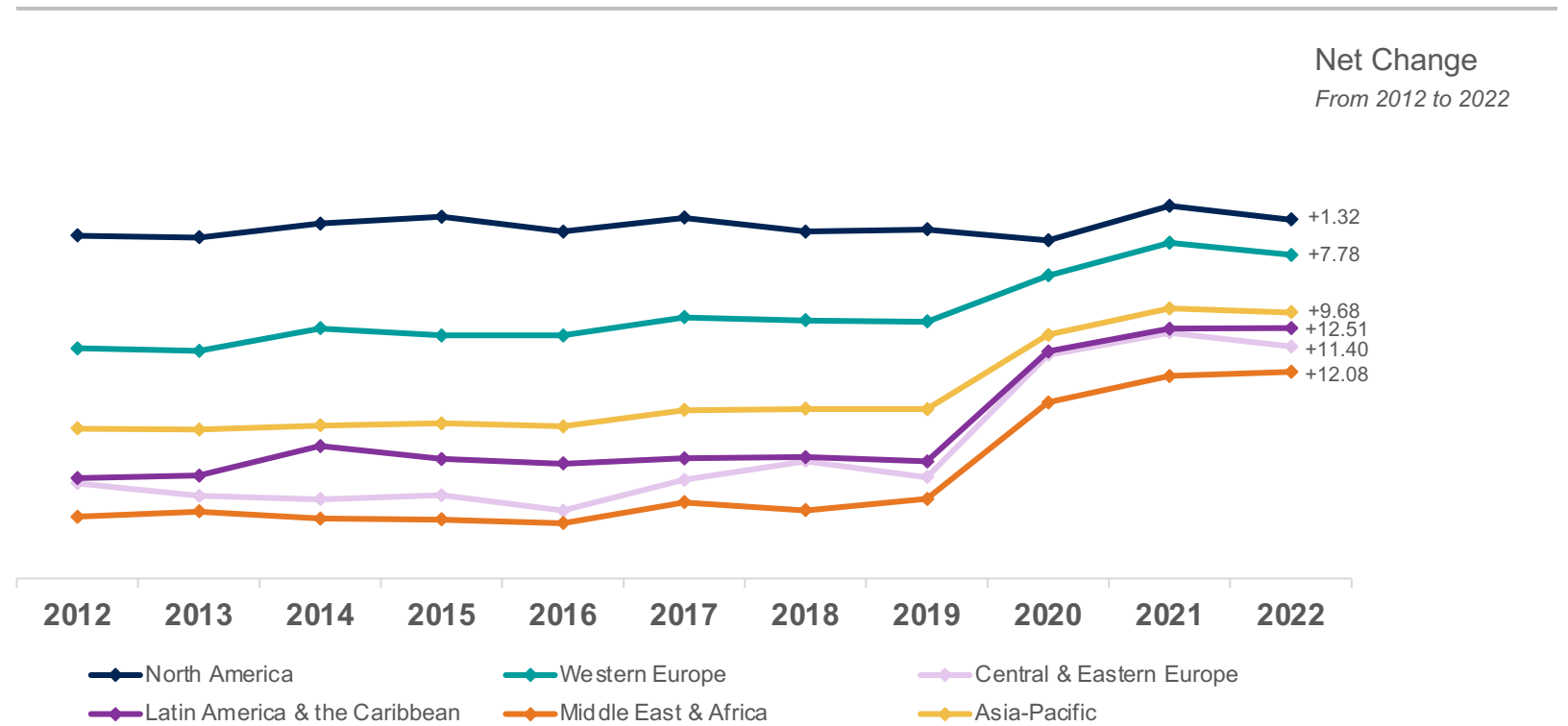
# Driver time-series

**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.**



Natural Beauty — 16%

Close Friend — 10%

Work & Live — 9%

Regional Average Performance

Net Change
*From 2012 to 2022*

+1.32
+7.78
+9.68
+12.51
+11.40
+12.08

2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

North America — Western Europe — Central & Eastern Europe
Latin America & the Caribbean — Middle East & Africa — Asia-Pacific
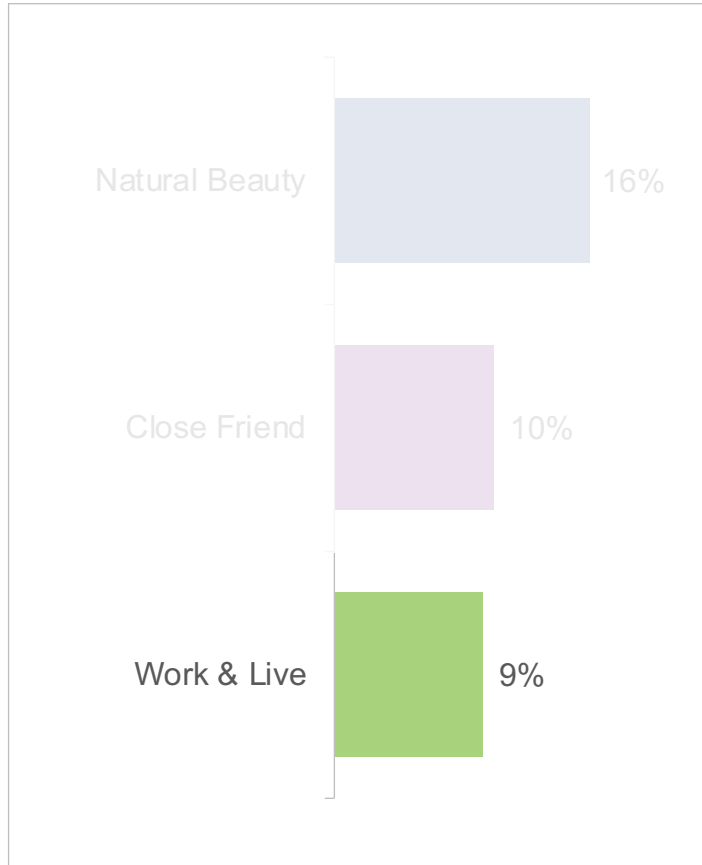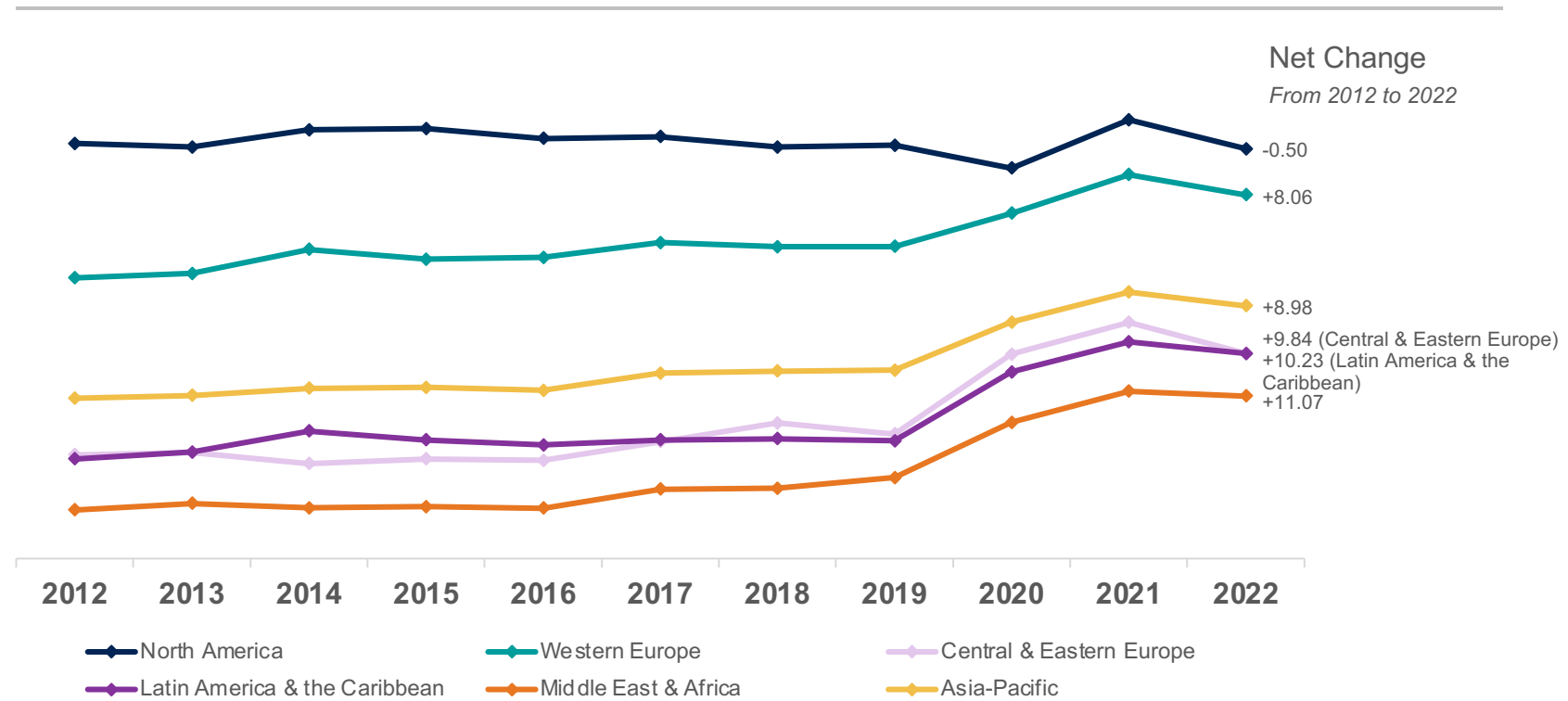
# Driver time-series

**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.**

| Driver | Value |
|---|---|
| Natural Beauty | 16% |
| Close Friend | 10% |
| Work & Live | 9% |

Regional Average Performance

Net Change
*From 2012 to 2022*

- North America: -0.50
- Western Europe: +8.06
- Asia-Pacific: +8.98
- +9.84 (Central & Eastern Europe)
- +10.23 (Latin America & the Caribbean)
- +11.07

**Legend:**
- North America
- Western Europe
- Central & Eastern Europe
- Latin America & the Caribbean
- Middle East & Africa
- Asia-Pacific

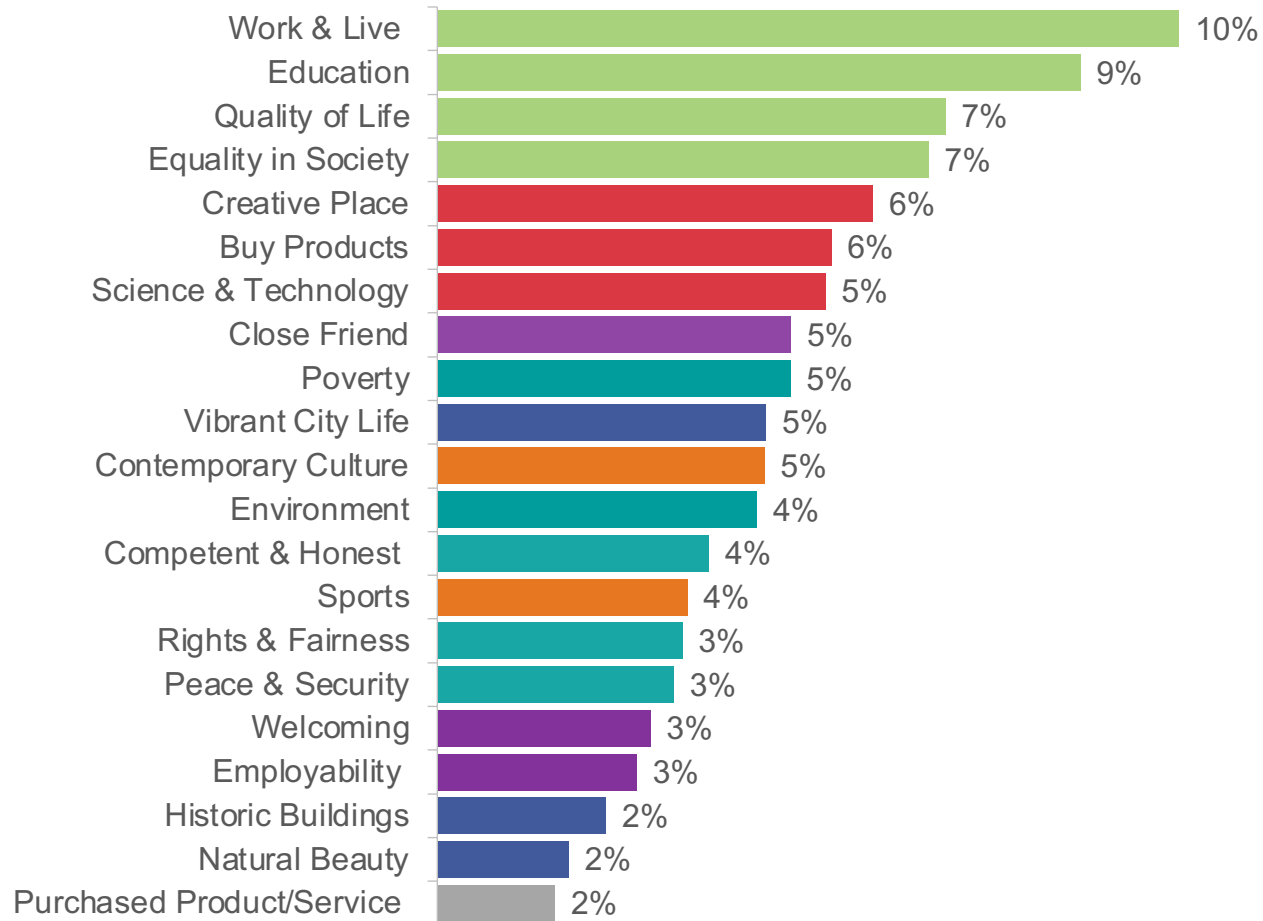X-axis: 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022

# d

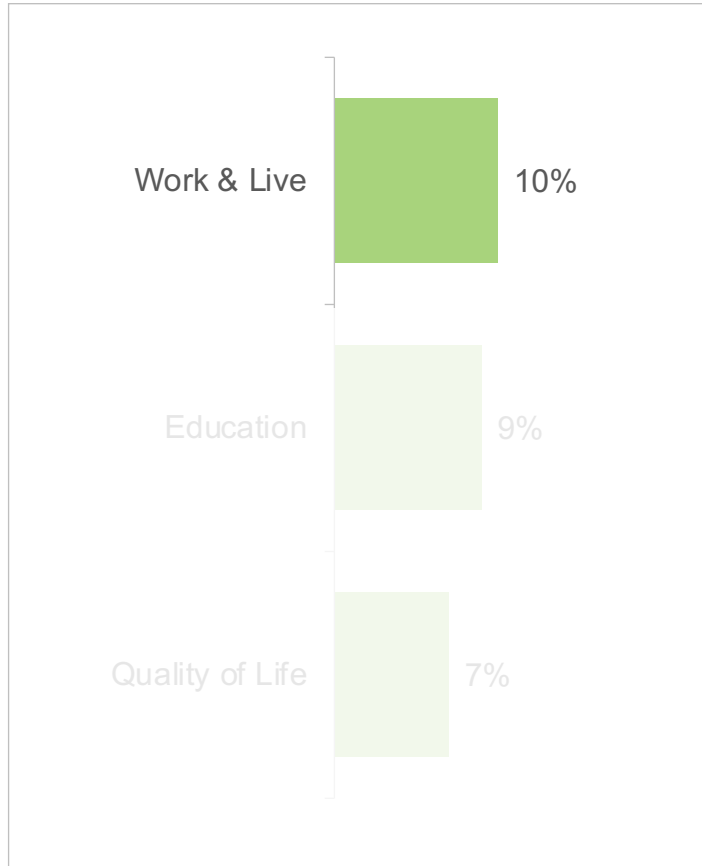## Desire to Invest Key Driver Analysis

*Anholt-Ipsos Nation Brands Index* [SM]

# Global Desire to Invest

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



Work & Live — 10%
Education — 9%
Quality of Life — 7%
Equality in Society — 7%
Creative Place — 6%
Buy Products — 6%
Science & Technology — 5%
Close Friend — 5%
Poverty — 5%
Vibrant City Life — 5%
Contemporary Culture — 5%
Environment — 4%
Competent & Honest — 4%
Sports — 4%
Rights & Fairness — 3%
Peace & Security — 3%
Welcoming — 3%
Employability — 3%
Historic Buildings — 2%
Natural Beauty — 2%
Purchased Product/Service — 2%

Immigration and Investment · Exports · Governance · Culture · People · Tourism
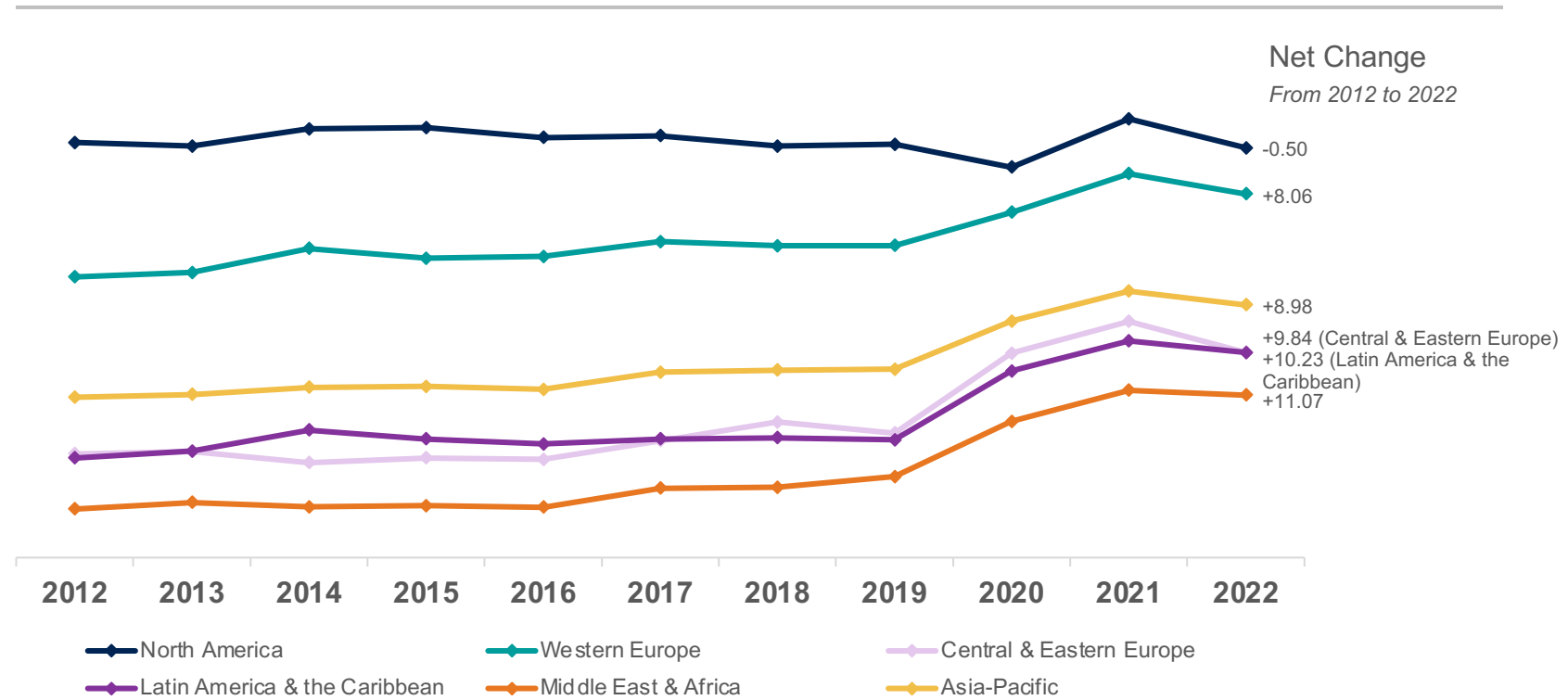
Nation Brand

# 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.
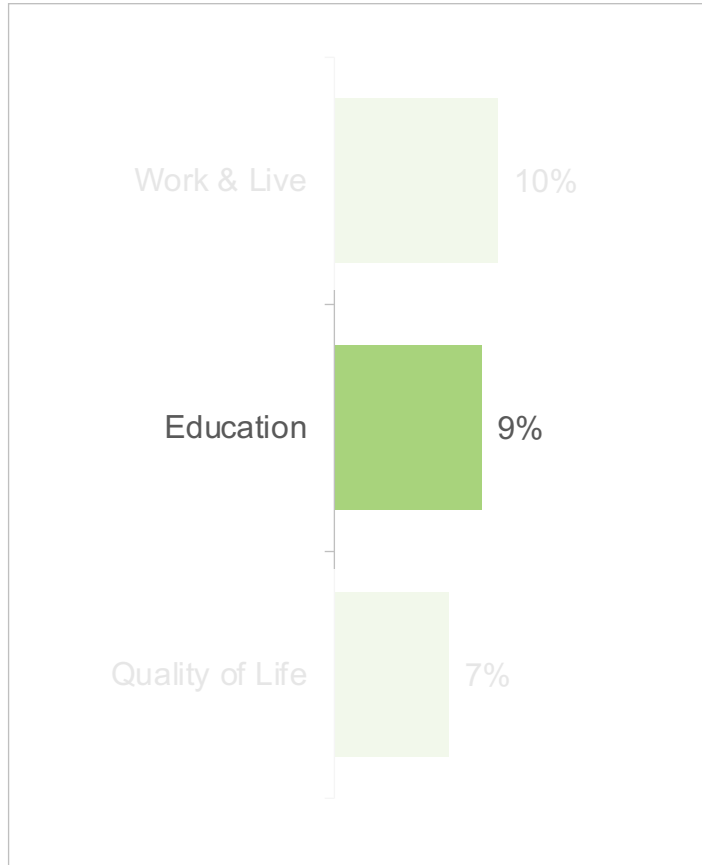
Work & Live — 10%

Education — 9%

Quality of Life — 7%

Regional Average Performance

Net Change
*From 2012 to 2022*

-0.50
+8.06
+8.98
+9.84 (Central & Eastern Europe)
+10.23 (Latin America & the Caribbean)
+11.07

2012  2013  2014  2015  2016  2017  2018  2019  2020  2021  2022

North America  —  Western Europe  —  Central & Eastern Europe
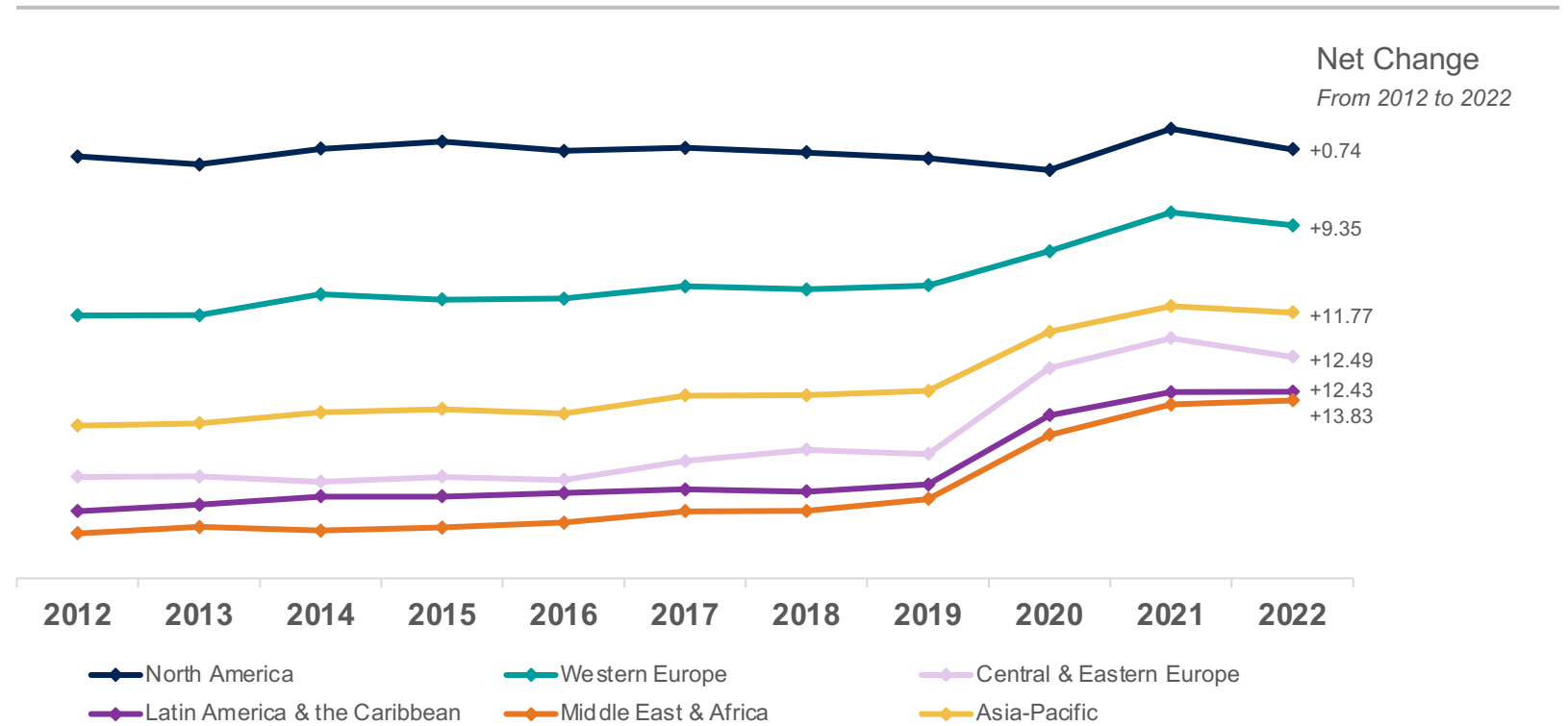Latin America & the Caribbean  —  Middle East & Africa  —  Asia-Pacific

# 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.**
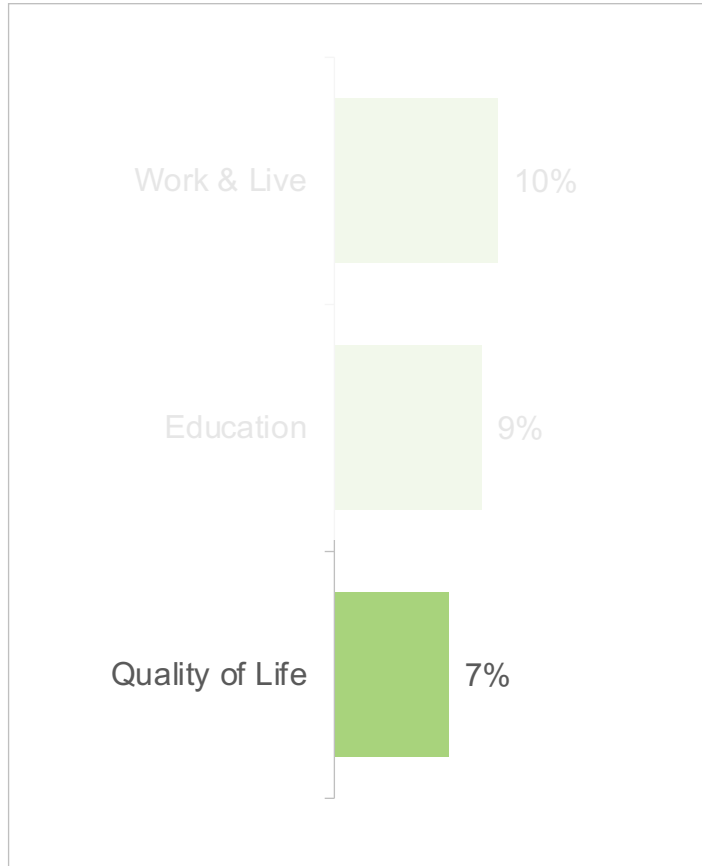
Work & Live  10%

**Education  9%**

Quality of Life  7%

Regional Average Performance

Net Change
*From 2012 to 2022*

+0.74

+9.35

+11.77

+12.49

+12.43

+13.83

| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |

North America —— Western Europe —— Central & Eastern Europe
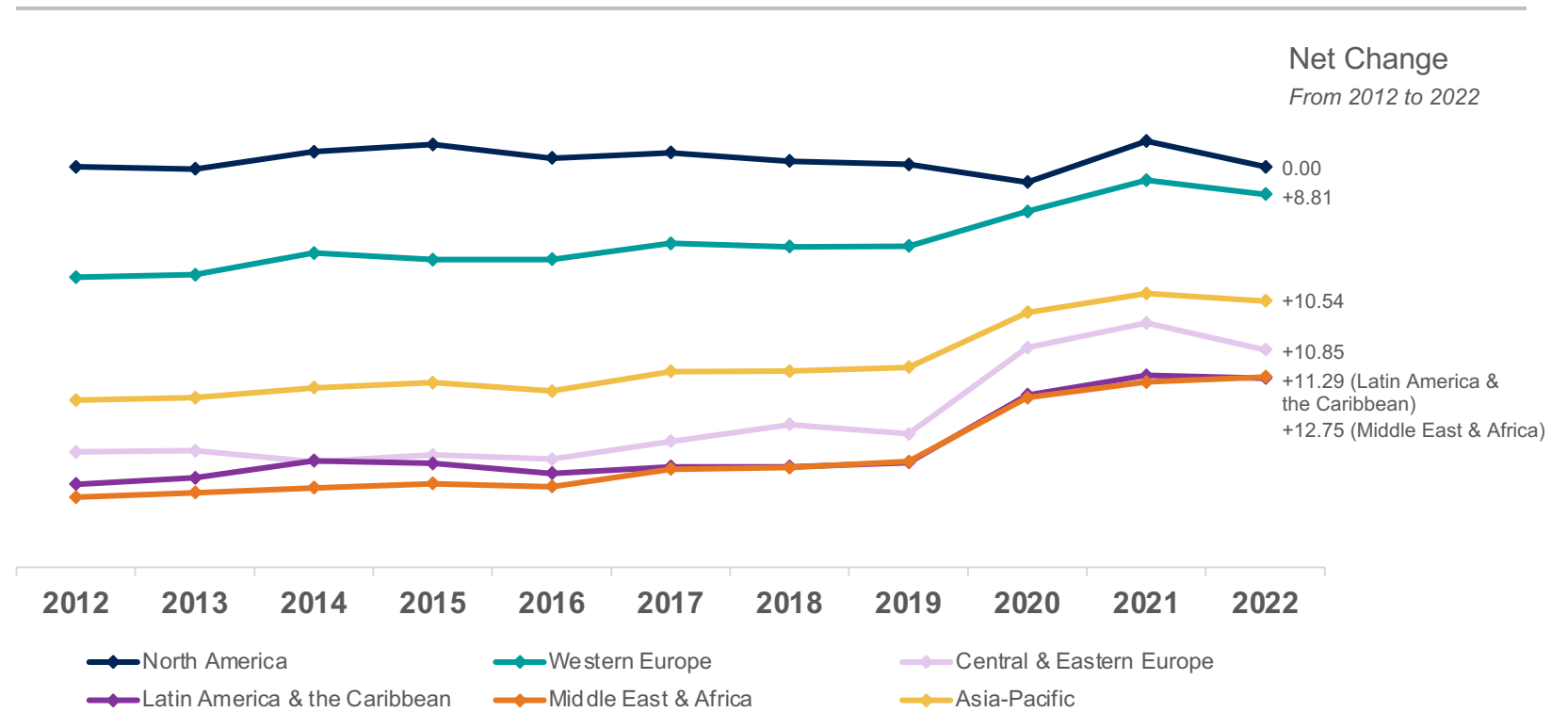Latin America & the Caribbean —— Middle East & Africa —— Asia-Pacific

Ipsos

# Driver Time-Series

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



Work & Live — 10%
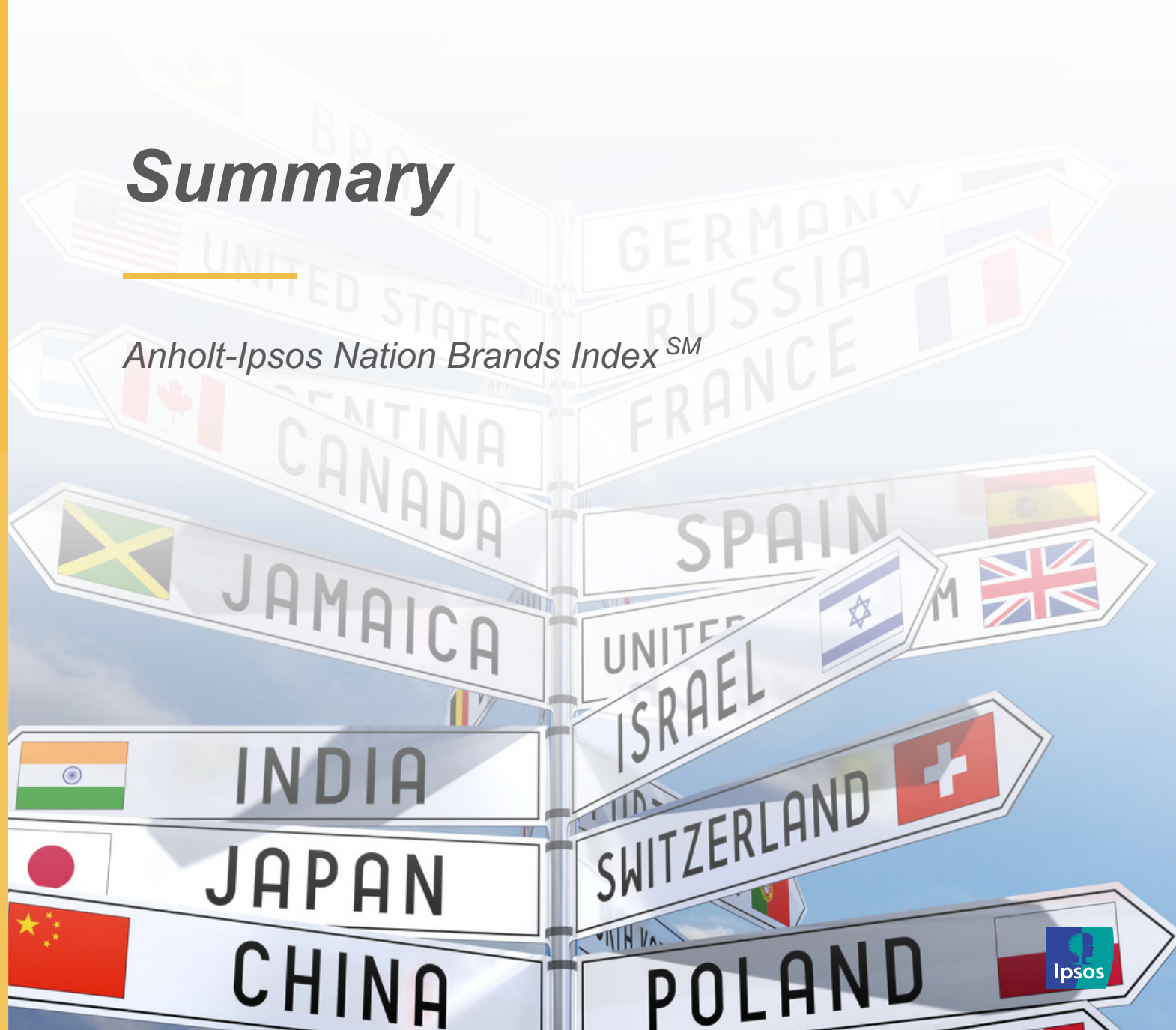
Education — 9%

Quality of Life — 7%

### Regional Average Performance

Net Change
*From 2012 to 2022*

0.00
+8.81
+10.54
+10.85
+11.29 (Latin America & the Caribbean)
+12.75 (Middle East & Africa)

2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

- North America
- Western Europe
- Central & Eastern Europe
- Latin America & the Caribbean
- Middle East & Africa
- Asia-Pacific

# *Summary*

*Anholt-Ipsos Nation Brands Index* SM

# 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*

Anholt-Ipsos Nation Brands Index[SM]

# 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

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

# About Simon Anholt

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.