# The Anholt-Ipsos Nation Brands Index[SM]

*Press Release – Supplemental Report*

*November 2023*

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# *Introduction*

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*Anholt-Ipsos Nation Brands Index* [SM]

# 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 are 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. Fieldwork was conducted from June 27th through August 3rd, 2023.
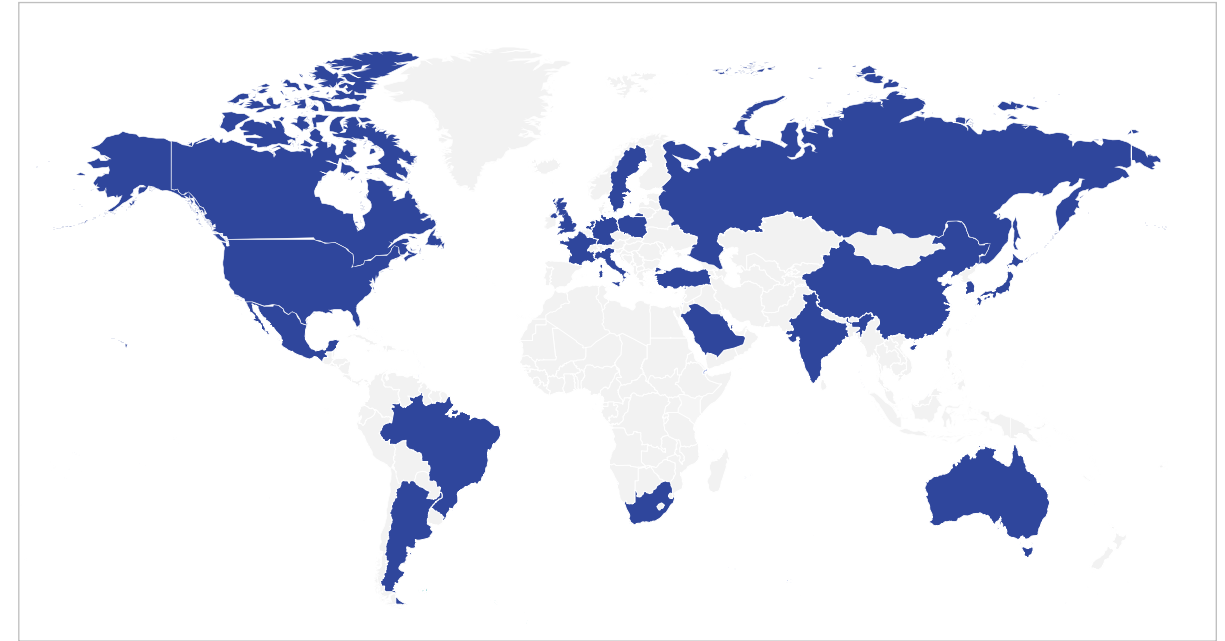
## The core 20 panel countries:

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

**Central and Eastern Europe**
Russia, Poland, Turkey/Türkiye

**Asia-Pacific**
Japan, China, India, South Korea, Australia

**Latin America**
Argentina, Brazil, Mexico

**Middle East/Africa**
Saudi Arabia, South Africa

# 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 2023 list of 60 nations is as follows, listed by region:

**Western Europe**

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

**North America**

The U.S., Canada

**Central/Eastern Europe**

Russia, Poland, Czech Republic, Hungary, Turkey/Türkiye, Ukraine, Slovakia, Romania

**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, Jordan, Israel, Morocco, Tanzania, Botswana

**Asia-Pacific**

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

*In 2023 Portugal, Romania, Philippines, and Jordan replaced Latvia, Palestine, Thailand, and Serbia.

# 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 2023, 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®.
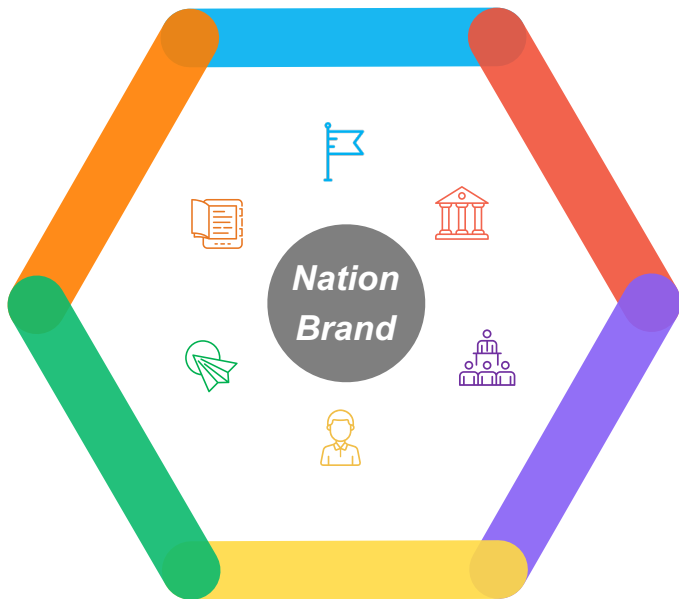


*In 2021, the list of measured nations increased from 50 to 60.

| | | |
|---|---|---|
| | **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. |
| | *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. |
| | *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. |
| | *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. |
| | *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. |
| | *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. |
| | *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. |

# 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: rated 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 2023 Findings

*Anholt-Ipsos Nation Brands Index [SM]*

# NBI 2023 Topline Findings

Japan places 1st overall on the Nation Brands Index, becoming the first nation other than Germany or the United States to take the top spot.

Germany drops to 2nd place for the first time since 2016, marking the end of its six-year reign in 1st place.

The UK reenters the top five, moving from 6th to 4th place. Italy drops from 4th to 5th, and the U.S. climbs from 8th to 6th. France exits the top five and drops from 5th to 8th – its lowest rank recorded.

Ukraine's overall score remains stable between 2022 and 2023, while most other countries saw improvements – resulting in the country falling 10 spots in overall rank, from 47th to 57th.

Overall desire to visit NBI nations reaches an all-time high in 2023 after declining in 2022.

Appeal of investing in NBI nations is back up after a decline last year.

# NBI 2023 Nation Rankings

**The NBI nations' ranks between 2022 and 2023 are as follows:**

| 2022 Rank | 2023 Rank | Nation | 2022 Rank | 2023 Rank | Nation | 2022 Rank | 2023 Rank | Nation | 2022 Rank | 2023 Rank | Nation | 2022 Rank | 2023 Rank | Nation | 2022 Rank | 2023 Rank | Nation |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | 1 | Japan | 11 | 11 | Spain | 20 | 21 | Greece | 33 | 31 | China | 40 | 41 | Chile | 52 | 51 | Ecuador |
| 1 | 2 | Germany | 12 | 12 | Norway | 21 | 22 | Iceland | 30 | 32 | Taiwan | 41 | 42 | South Africa | 49 | 52 | Panama |
| 3 | 3 | Canada | 13 | 13 | Netherlands | 22 | 23 | Wales | 32 | 33 | Hungary | - | 43 | Romania | 54 | 53 | Colombia |
| 6 | 4 | United Kingdom | 14 | 14 | New Zealand | 23 | 24 | South Korea | 31 | 34 | Mexico | 45 | 44 | Indonesia | 57 | 54 | Saudi Arabia |
| 4 | 5 | Italy | 16 | 15 | Finland | 24 | 25 | Northern Ireland | 37 | 35 | Slovakia | 46 | 45 | United Arab Emirates | - | 55 | Jordan |
| 8 | 6 | United States | 15 | 16 | Scotland | 25 | 26 | Singapore | 35 | 36 | Egypt | 44 | 46 | Israel | 55 | 56 | Kenya |
| 7 | 7 | Switzerland | 16 | 17 | Austria | 27 | 27 | Brazil | 36 | 37 | Turkey/Türkiye | 51 | 47 | Vietnam | 47 | 57 | Ukraine |
| 5 | 8 | France | 18 | 18 | Ireland | 26 | 28 | Poland | 39 | 38 | India | - | 48 | Philippines | 56 | 58 | Tanzania |
| 10 | 9 | Australia | 19 | 19 | Belgium | 29 | 29 | Argentina | 38 | 39 | Peru | 50 | 49 | Dominican Republic | 58 | 59 | Russia |
| 9 | 10 | Sweden | - | 20 | Portugal | 28 | 30 | Czech Republic | 42 | 40 | Morocco | 53 | 50 | Qatar | 59 | 60 | Botswana |

# NBI 2023 Top Ten Nation Rankings

**The nations composing the top ten are unchanged from 2022, but many have shifted in rank.**

| 2022 Rank | 2023 Rank | Nation | |
|:---:|:---:|:---:|:---:|
| 2 | 1 | Japan | ⬆ +1 |
| 1 | 2 | Germany | ⬇ -1 |
| 3 | 3 | Canada | |
| 6 | 4 | United Kingdom | ⬆ +2 |
| 4 | 5 | Italy | ⬇ -1 |
| 8 | 6 | United States | ⬆ +2 |
| 7 | 7 | Switzerland | |
| 5 | 8 | France | ⬇ -3 |
| 10 | 9 | Australia | ⬆ +1 |
| 9 | 10 | Sweden | ⬇ -1 |

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# Japan's Rise in the Ranks

**Japan takes 1st place in 2023 and completes its steady progress from 5th place in 2019.**

### Japan NBI Rank Change (2008-2023)
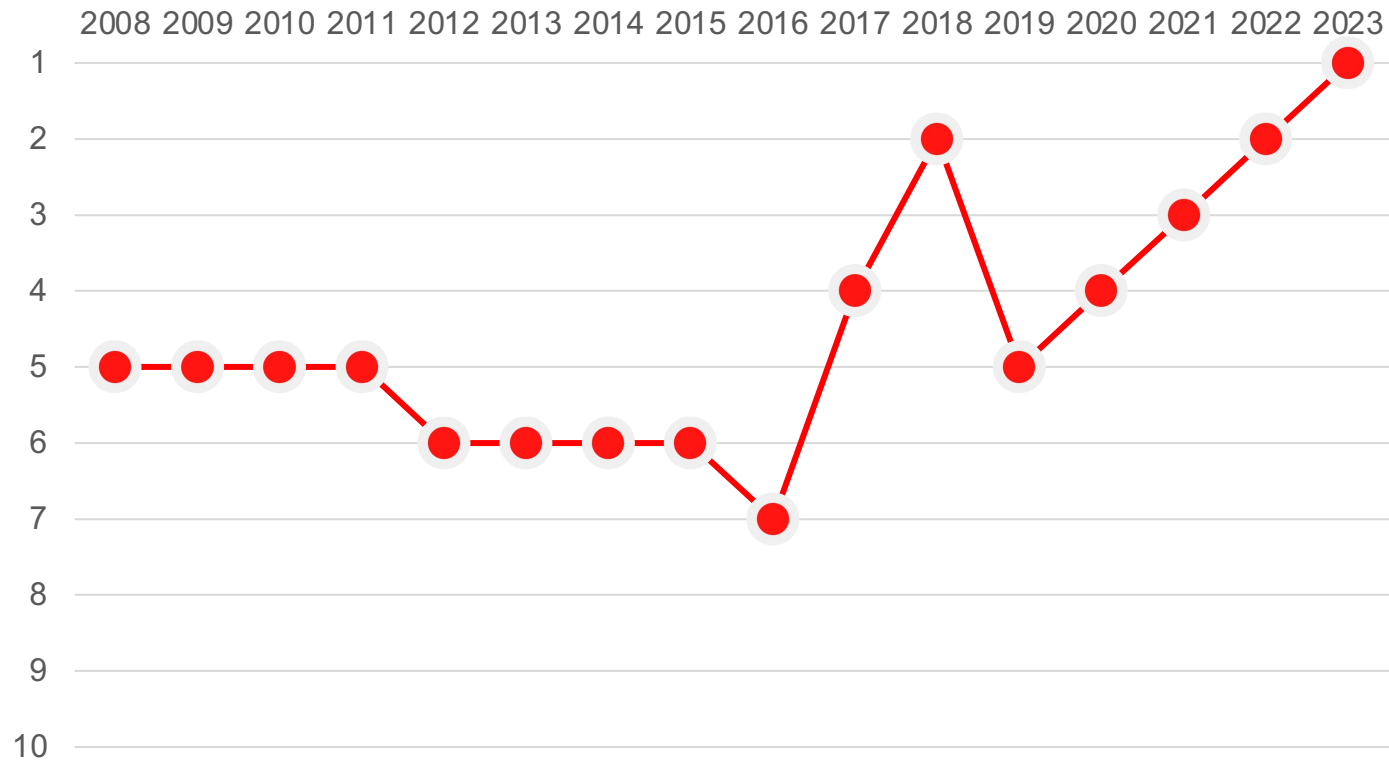


*Please note that starting in 2021, the number of measured nations was increased from 50 to 60.*

# Ukraine's Drop in Rank

**Ukraine falls to the bottom five in 2023 after relatively steady rankings from 2017 to 2022. The country's scores have not increased at the same rate as the global average, resulting in a large negative ranking shift.**

### Ukraine NBI Rank Change (2017-2023)
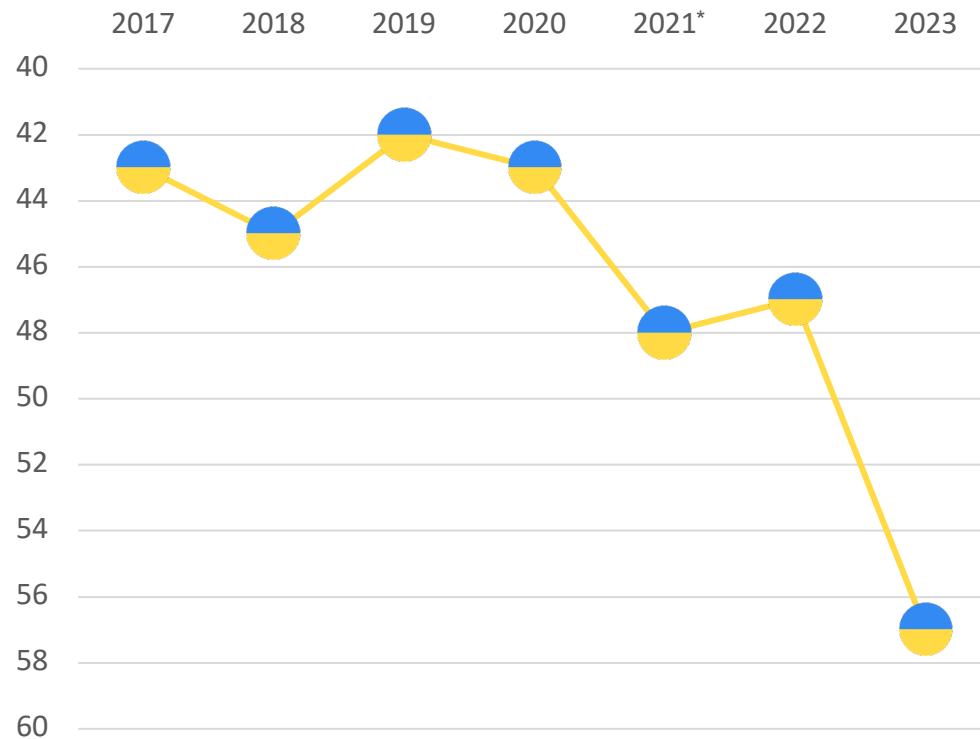
| 2017 | 2018 | 2019 | 2020 | 2021* | 2022 | 2023 |
|------|------|------|------|-------|------|------|



*Please note that starting in 2021, the number of measured nations was increased from 50 to 60.*

### NBI Score Change (2022-2023)

|  |  | Global Average** | Ukraine |
|---|---|---|---|
| Overall NBI | | +0.90 | -0.07 |
| Exports | | +1.32 | +0.69 |
| Governance | | +0.49 | -0.88 |
| Culture | | +0.69 | +0.01 |
| People | | +0.75 | -0.34 |
| Tourism | | +0.24 | -1.47 |
| Immigration and Investment | | +1.90 | +1.55 |

*Jordan, Philippines, Portugal, and Romania were not measured in 2022 and are therefore not included in Global Average score change calculations.*

# Desire To Visit and Invest Increase

**The overall desire to visit and invest in nations declined in 2022 but are back up in 2023.**



**Desire to Visit – Overall Average Ratings**

2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021* | 2022 | 2023
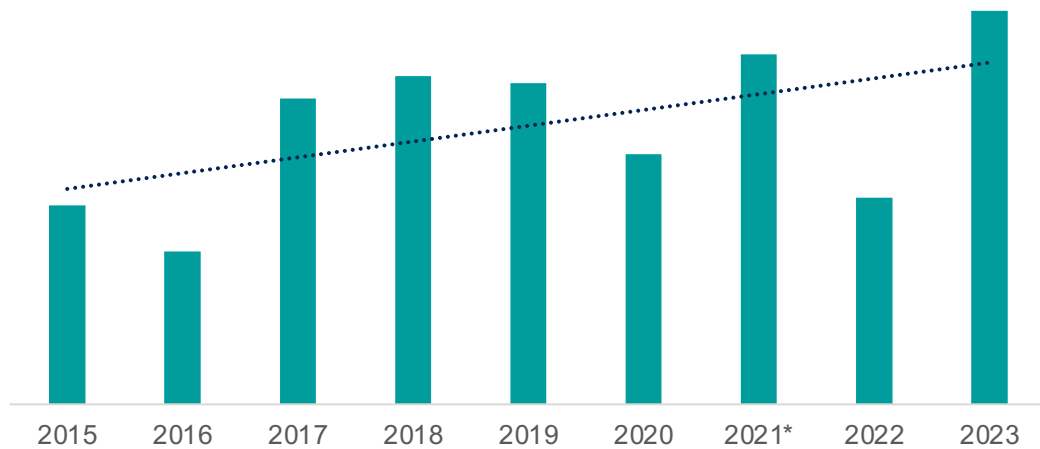
**Desire to Invest in Countries' Businesses – Overall Average Ratings**
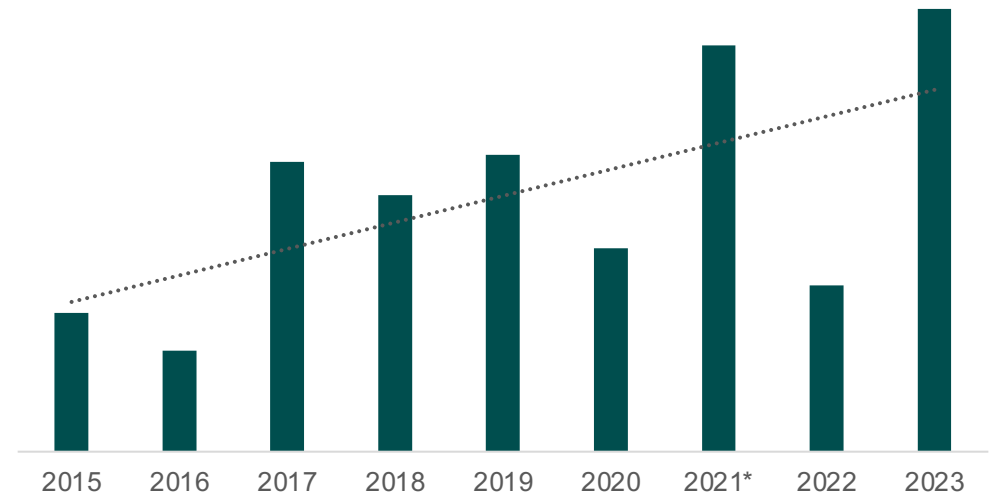
2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021* | 2022 | 2023

*\*Please note that starting in 2021, the number of measured nations was increased from 50 to 60.*

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## New NBI Common Interest Questions

*Anholt-Ipsos Nation Brands Index*[SM]

# Introduction to New Common Interest Questions

**In 2023, the NBI is supplemented by new common interest questions\* on various topics.**
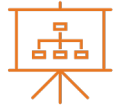
## *Nation Personality Associations*

This supplemental question explores the way respondents characterize each measured nation.

Respondents are asked to assign up to three personality traits to each measured nation. The list of personality traits includes 17 attributes – both positive and negative.

Positive traits are words like "friendly" and "strong," while negative traits include words like "greedy" and "dangerous."

## *Common Interest Attributes*

Newly added common interest attributes explore topics of growing importance to a nation's reputation.

Five of the new common interest attributes focus on sustainability – measuring perceptions of areas like a nation's work to combat climate change or support affordable and clean energy. The other six attributes cover a range of topics like global economic leadership and feeling safe in the country.

The 11 new attributes are considered separate from the NBI's 23 core reputational attributes that make up the index.

*\*The attributes included in the six NBI indices and all score calculations have remained consistent with previous years to ensure trends may be evaluated.*

# Nations as Personalities

**The top three nations associated with each trait vary.**

## Top Three Nations by Personality Trait

| Trait | 1st | 2nd | 3rd |
|---|---|---|---|
| Trustworthy | Switzerland | Canada | Finland |
| Friendly | New Zealand | Portugal | Spain |
| Happy | New Zealand | Spain | Ireland |
| Creative | Japan | South Korea | Taiwan |
| Strong | Germany | U.S. | China |
| Fun | Brazil | Spain | Italy |
| Generous | Canada | New Zealand | Ireland |
| Attractive | Italy | Greece | New Zealand |
| Competent | Germany | Japan | South Korea |
| Sophisticated | France | Switzerland | UK |

| Trait | 1st | 2nd | 3rd |
|---|---|---|---|
| Greedy | China | Russia | U.S. |
| Dull | Slovakia | Romania | Poland |
| Arrogant | Russia | U.S. | Saudi Arabia |
| Deceitful | Russia | China | Saudi Arabia |
| Weak | Botswana | Kenya | Tanzania |
| Dangerous | Russia | Ukraine | Colombia |
| Troubled | Ukraine | South Africa | Israel |

# Common Interest Attributes - Sustainability

**Many nations that are in the top ten overall on NBI also rank highly on sustainability attributes.**

### Top Three Nation Rankings

| Attribute | 1st | 2nd | 3rd |
|---|---|---|---|
| "This country is taking action to combat climate change." | Sweden | Norway | Germany |
| "This country is working hard towards affordable and clean energy." | Sweden | Germany | Norway |
| "This country is focused on protecting wildlife and restoring habitats." | Australia | Canada | New Zealand |
| "This country is focused on access to clean water and nutrition for all." | Sweden | Canada | Switzerland (T-2) |
| "This country encourages more responsible industries that do not damage the environment." | Sweden | Switzerland (T-1) | Norway |

*New attributes are not included in NBI Index calculations.*

# Common Interest Attributes – Additional Topics

**Also new in 2023 are a variety of attributes that examine different areas of nations' reputations.**

## Top Three Nation Rankings

| Attribute | 1st | 2nd | 3rd |
|---|---|---|---|
| "I trust the products that are made in this country." | Japan | Germany | United States |
| "I think of this country as a global economic leader." | United States | Japan | Germany |
| "This country's food is good." | Italy | France | Spain |
| "This country is honest about its past." | Switzerland | Sweden | Canada/Norway/Scotland |
| "I would feel safe in this country." | Switzerland | Canada | Norway |
| "This place is unlike anywhere else." | Japan | Egypt | Italy (T-2) |

*New attributes are not included in NBI Index calculations.*

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## Desire to Visit & Invest Key Driver Analysis

Anholt-Ipsos Nation Brands Index [SM]

# Global Desire to Visit Drivers

**Natural beauty is the top driver of desire to visit a nation. New attributes related to sustainability are not key drivers of Global Respondents' desire to visit nations.**



= *new attributes added in 2023**

*New attributes are not included in NBI Index calculations.*

| Attribute | % |
|---|---|
| Natural Beauty | 12% |
| Work & Live | 7% |
| Close Friend | 7% |
| Safe* | 6% |
| Vibrant City Life | 6% |
| Welcoming | 5% |
| Historic Buildings | 4% |
| Quality of Life | 4% |
| Unlike Anywhere Else* | 4% |
| Education | 3% |
| Cultural Heritage | 3% |
| Trust Products* | 3% |
| Food* | 3% |
| Rights & Fairness | 2% |
| Contemporary Culture | 2% |
| Creative Place | 2% |
| Equality in Society | 2% |
| Buy Products | 2% |
| Environment | 2% |
| Competent & Honest | 2% |
| Clean Water & Nutrition* | 2% |
| Responsible Industries* | 2% |
| Honest about Past* | 2% |
| Affordable & Clean Energy* | 2% |
| Combat Climate Change* | 2% |
| Protecting Wildlife* | 2% |
| Sports | 1% |
| Science & Technology | 1% |
| Global Economic Leader* | 1% |

# Global Desire to Visit Drivers

**Australia, Canada, Switzerland, and the U.S. lead the rankings on the drivers of desire to visit nations.**

### Top Three Nation Rankings

| Attribute | Importance | 1st | 2nd | 3rd |
|---|---|---|---|---|
| Natural Beauty | 12% | Australia | New Zealand | Canada |
| Work & Live | 7% | Canada | Switzerland | Italy |
| Close Friend | 7% | Canada | Italy (T-1) | Australia |
| Safe* | 6% | Switzerland | Canada | Norway |
| Vibrant City Life | 6% | U.S. | France | Italy (T-2) |

Exports  Governance  Culture  People  Tourism  Immigration/Investment

= *new attributes added in 2023**

*\*\*New attributes are not included in NBI Index calculations.*

# Global Desire to Invest Drivers

**Being willing to work and live in a country for an extended period is the most important driver of desire to invest in nations, followed by educational qualifications.**



Exports

Immigration and Investment

Governance

Nation Brand

Tourism

Culture

People

= *new attributes added in 2023**

***New attributes are not included in NBI Index calculations.*

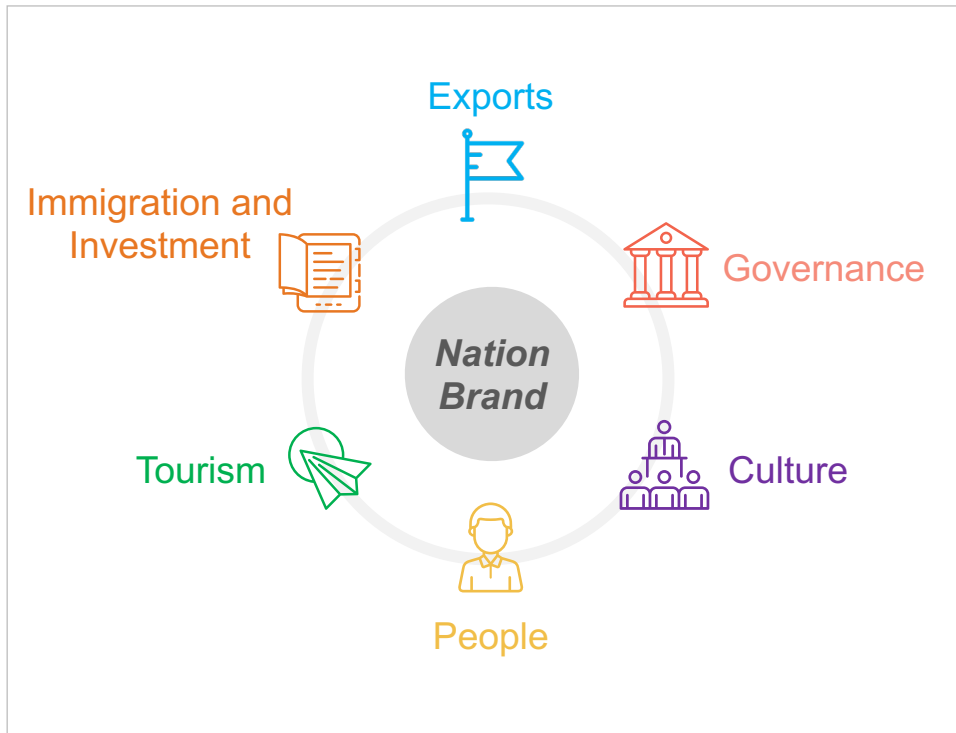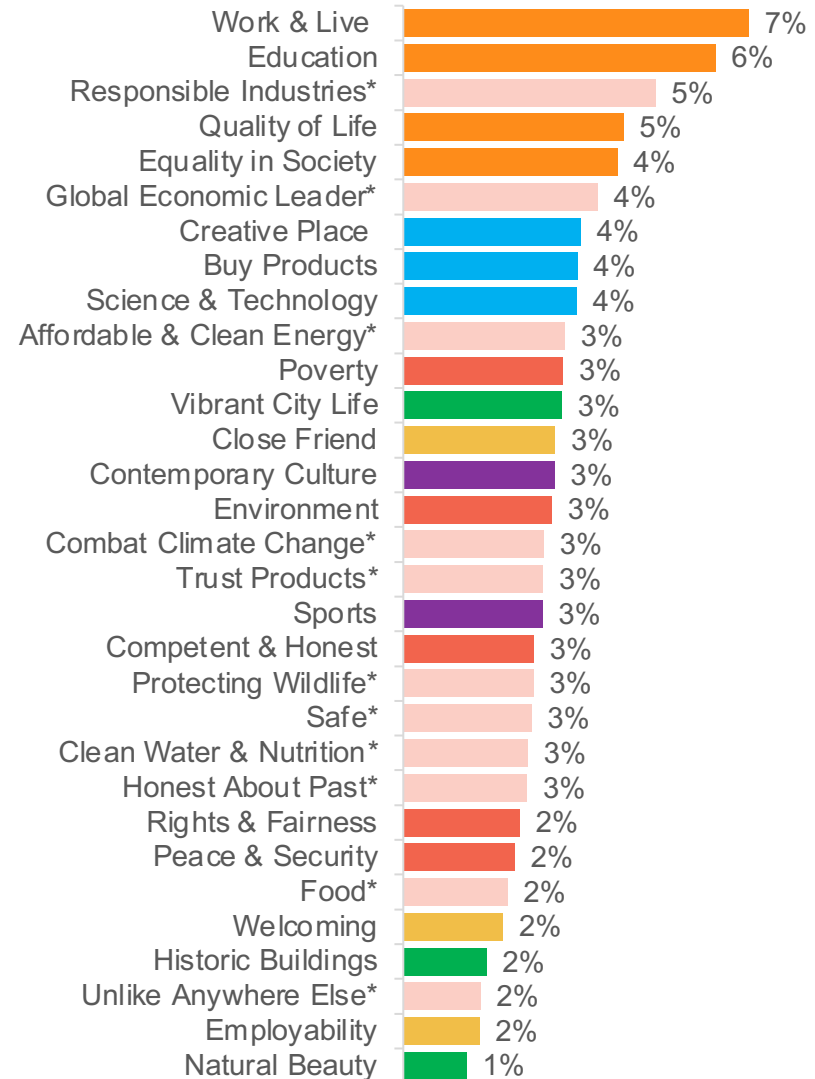| Attribute | % |
|---|---|
| Work & Live | 7% |
| Education | 6% |
| Responsible Industries* | 5% |
| Quality of Life | 5% |
| Equality in Society | 4% |
| Global Economic Leader* | 4% |
| Creative Place | 4% |
| Buy Products | 4% |
| Science & Technology | 4% |
| Affordable & Clean Energy* | 3% |
| Poverty | 3% |
| Vibrant City Life | 3% |
| Close Friend | 3% |
| Contemporary Culture | 3% |
| Environment | 3% |
| Combat Climate Change* | 3% |
| Trust Products* | 3% |
| Sports | 3% |
| Competent & Honest | 3% |
| Protecting Wildlife* | 3% |
| Safe* | 3% |
| Clean Water & Nutrition* | 3% |
| Honest About Past* | 3% |
| Rights & Fairness | 2% |
| Peace & Security | 2% |
| Food* | 2% |
| Welcoming | 2% |
| Historic Buildings | 2% |
| Unlike Anywhere Else* | 2% |
| Employability | 2% |
| Natural Beauty | 1% |

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# Global Desire to Invest Drivers

**Canada, Sweden, and Switzerland receive multiple top three ranks on the drivers of desire to invest.**

## Top Three Nation Rankings

| Attribute | Importance | 1st | 2nd | 3rd |
|---|---|---|---|---|
| Work & Live | 7% | 🇨🇦 Canada | 🇨🇭 Switzerland | 🇮🇹 Italy |
| Education | 6% | 🇺🇸 U.S. | 🇬🇧 UK | 🇩🇪 Germany |
| Responsible Industries | 5% | 🇸🇪 Sweden | 🇨🇭 Switzerland (T-1) | 🇳🇴 Norway |
| Quality of Life | 5% | 🇨🇭 Switzerland | 🇨🇦 Canada | 🇸🇪 Sweden |
| Equality in Society | 4% | 🇸🇪 Sweden | 🇨🇦 Canada | 🇳🇴 Norway |

Exports   Governance   Culture   People   Tourism   Immigration/ Investment

= *new attributes added in 2023**

*italic: **New attributes are not included in NBI Index calculations.*

# Desire to Visit and Invest Summary

The top drivers for desire to visit come from the Tourism, Immigration and Investment, and People Indices. However, desire to invest is largely driven by attributes on the Immigration and Investment Index.

The impact of the new attributes on desire to visit and invest is varied.

- Feeling safe in a country is the fourth-most impactful driver of desire to visit, and encouraging responsible industries is the third-most impactful on desire to invest.

- Sustainability attributes have low impact on the desire to visit nations.

Performance on top key drivers is led by nations from the North America, Europe, and Asia-Pacific regions.

- Canada, Australia, Switzerland, and Italy lead the rankings on drivers of desire to visit.

- Rankings on key drivers of desire to invest are led by Sweden, Canada, and Switzerland.

# *Appendix*

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*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 |

# Attribute Key – New Common Interest Questions

| Full Attribute | Shortened Attribute |
|---|---|
| This country is taking action to combat climate change. | Combat Climate Change |
| This country is working hard towards affordable and clean energy. | Affordable & Clean Energy |
| This country is focused on protecting wildlife and restoring habitats. | Protecting Wildlife |
| This country is focused on access to clean water and nutrition for all. | Clean Water & Nutrition |
| This country encourages more responsible industries that do not damage the environment. | Responsible Industries |
| I trust the products that are made in this country. | Trust Products |
| I think of this country as a global economic leader. | Global Economic Leader |
| This country's food is good. | Food |
| This country is honest about its past. | Honest About Past |
| I would feel safe in this country. | Safe |
| This place is unlike anywhere else. | Unlike Anywhere Else |

*\*\*New attributes are not included in NBI Index calculations.*

# 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.

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