

The Anholt-Ipsos Nation Brands IndexSM

*Press Release – Supplemental Report
November 2023*



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Introduction

Anholt-Ipsos Nation Brands IndexSM

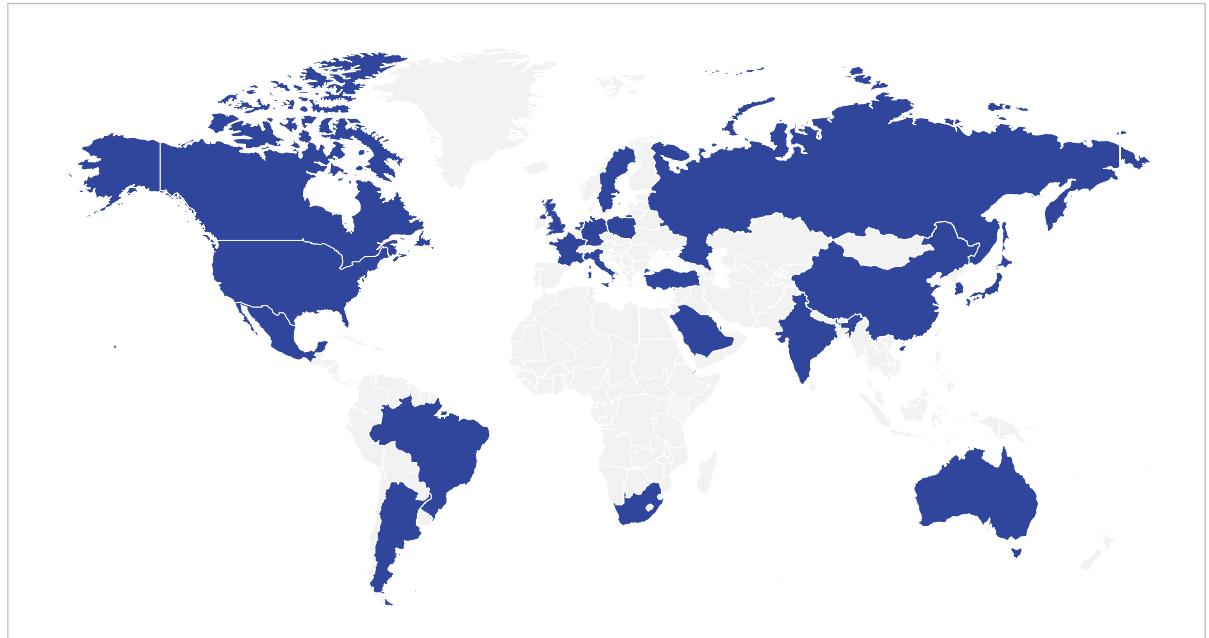


Introduction to NBI



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:



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.

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NBI 2023 Findings

Anholt-Ipsos Nation Brands IndexSM

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

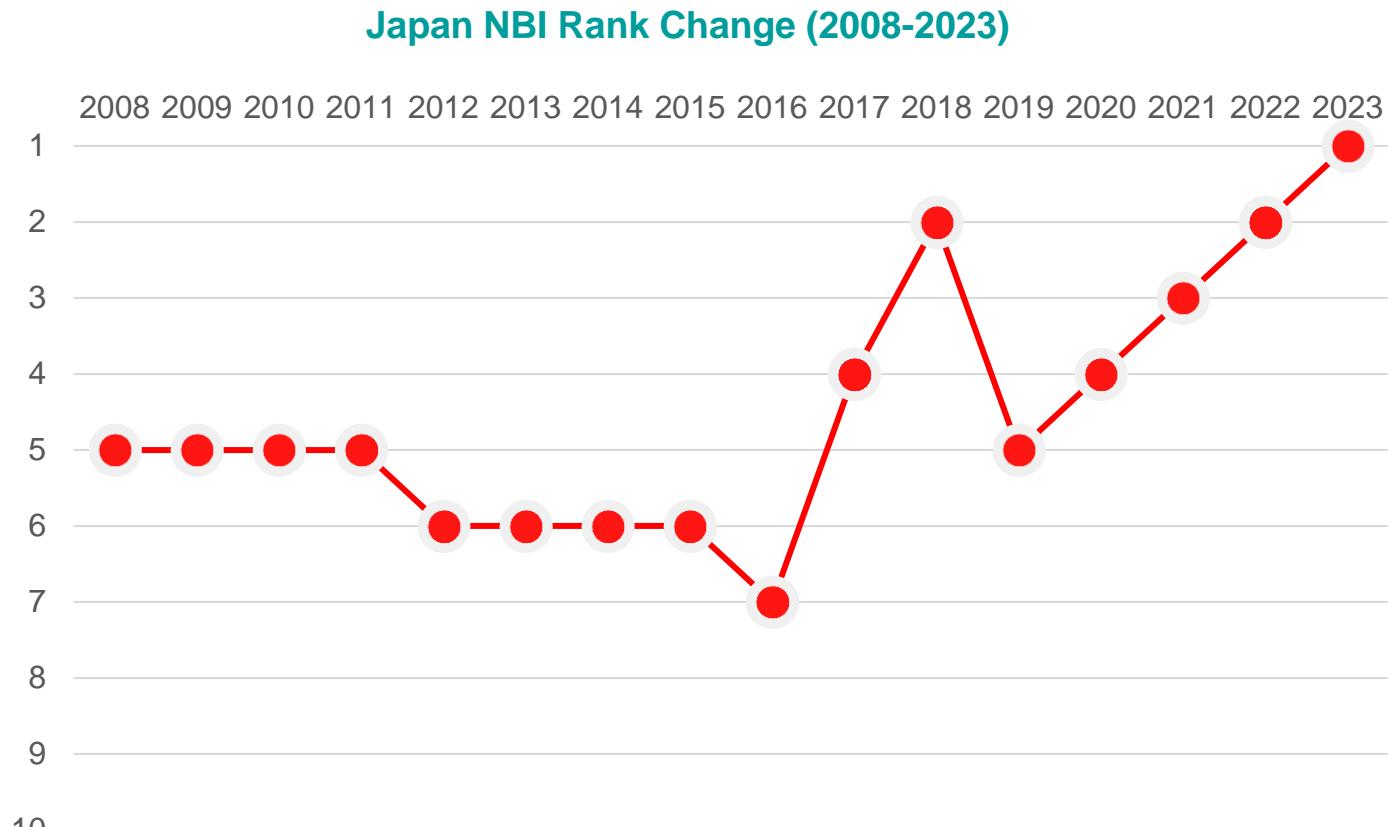
NBI 2023 Top Ten Nation Rankings

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

2022 Rank	2023 Rank	Nation	Change
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

Japan's Rise in the Ranks

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

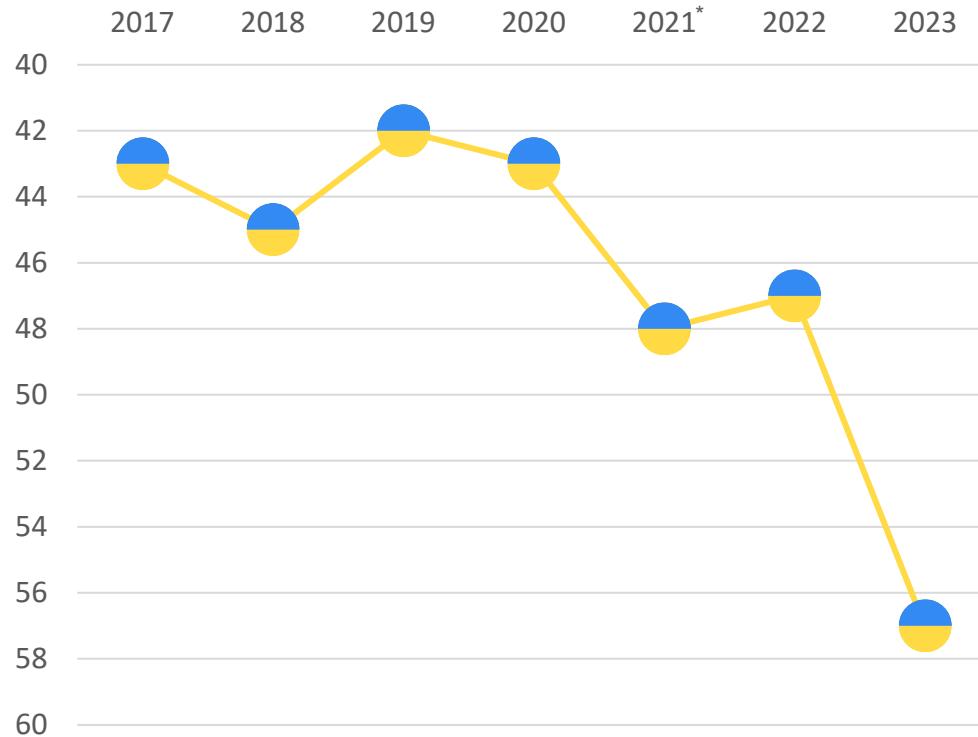


*Please note that starting in 2021, the number of measured nations was increased from 50 to 60.

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)



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

NBI Score Change (2022-2023)

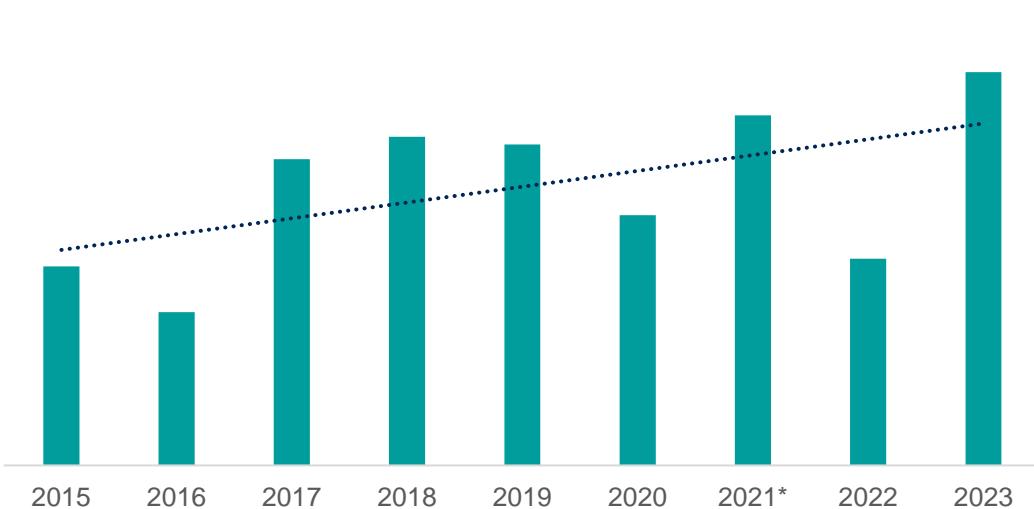
	Global Average**	Ukraine
Overall NBI	+0.90	-0.07
Exports	+1.32	+0.69
Governance	+0.49	-0.88
Culture	+0.69	+0.01
People	+0.75	-0.34
Tourism	+0.24	-1.47
Immigration and Investment	+1.90	+1.55

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

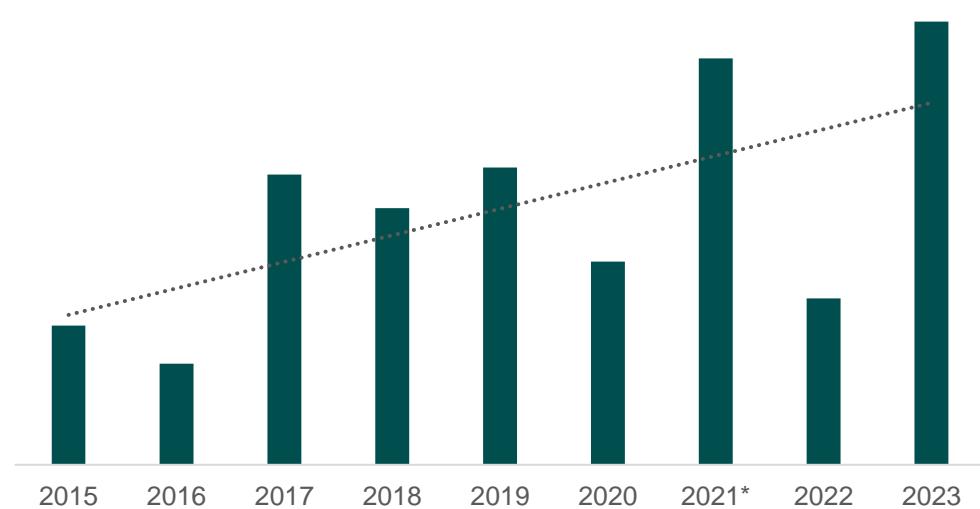
Desire To Visit and Invest Increase

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

Desire to Visit – Overall Average Ratings



Desire to Invest in Countries' Businesses – Overall Average Ratings



*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

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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.

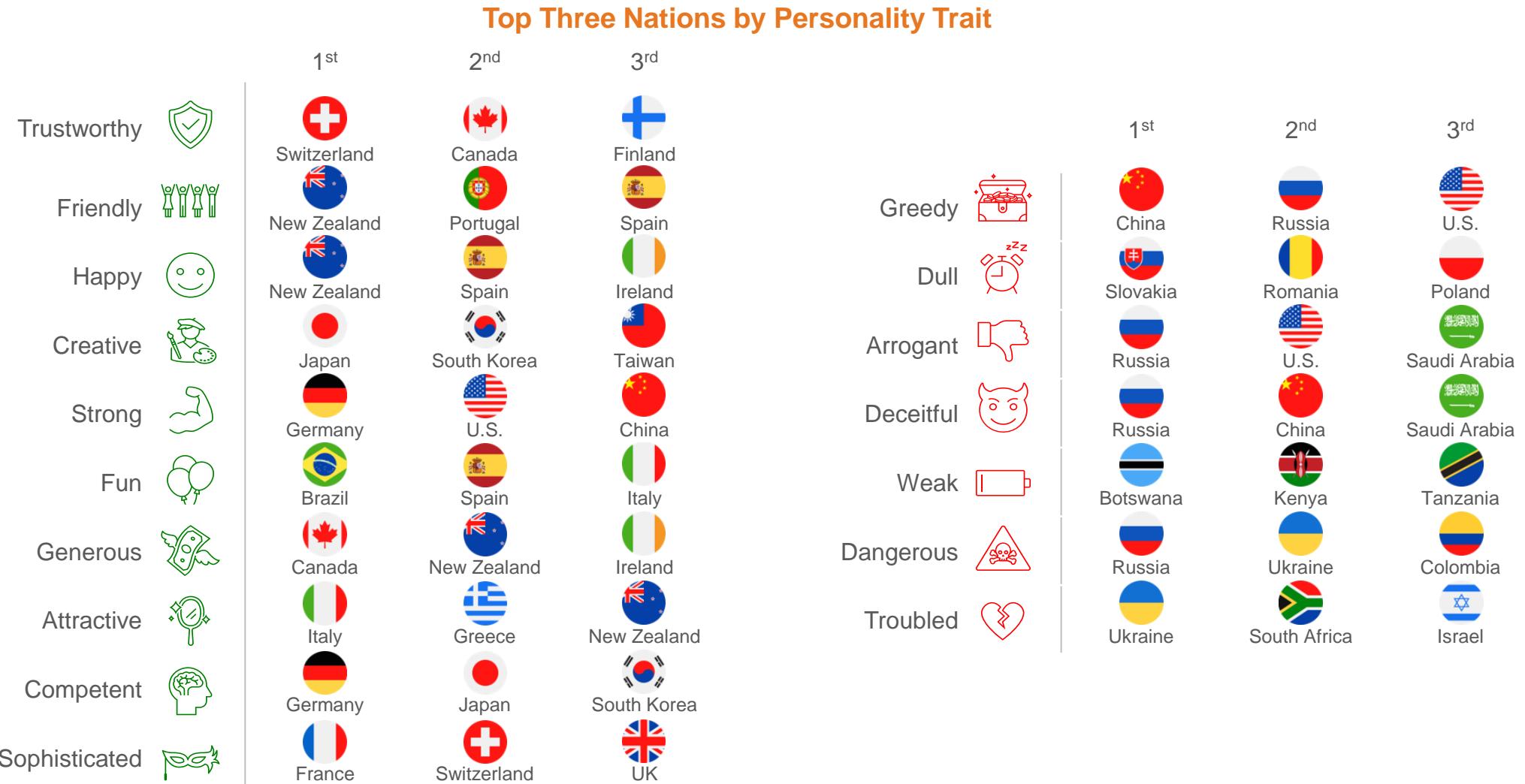
Five of the new common interest attributes focus on sustainability – measuring perceptions of areas like a nation’s work to combat climate change or support affordable and clean energy. The other six attributes cover a range of topics like global economic leadership and feeling safe in the country.

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.



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	1 st	2 nd	3 rd
“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	1 st	2 nd	3 rd
"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

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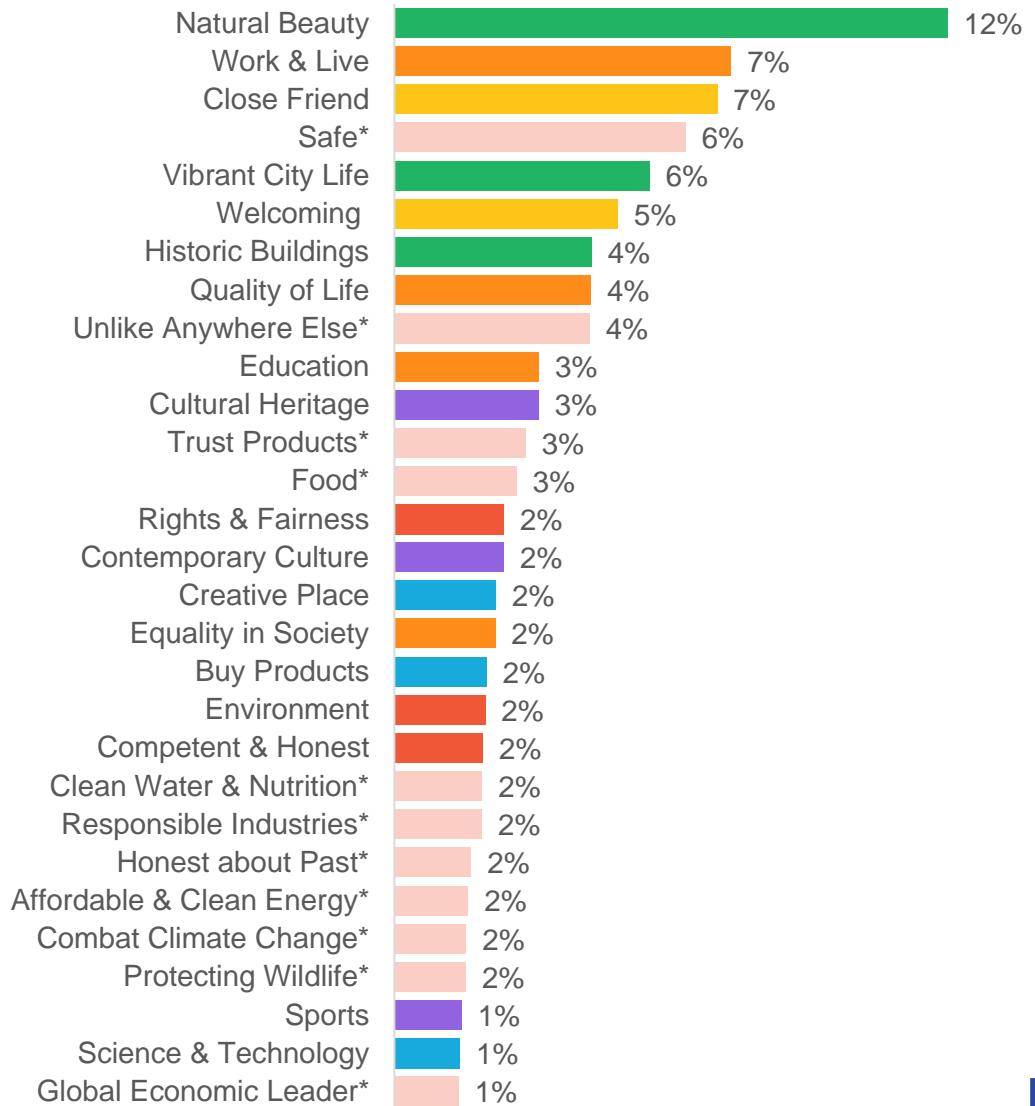


Global Desire to Visit Drivers

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 are not included in NBI Index calculations.



Global Desire to Visit Drivers

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

Attribute	Importance	Top Three Nation Rankings		
		1 st	2 nd	3 rd
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)



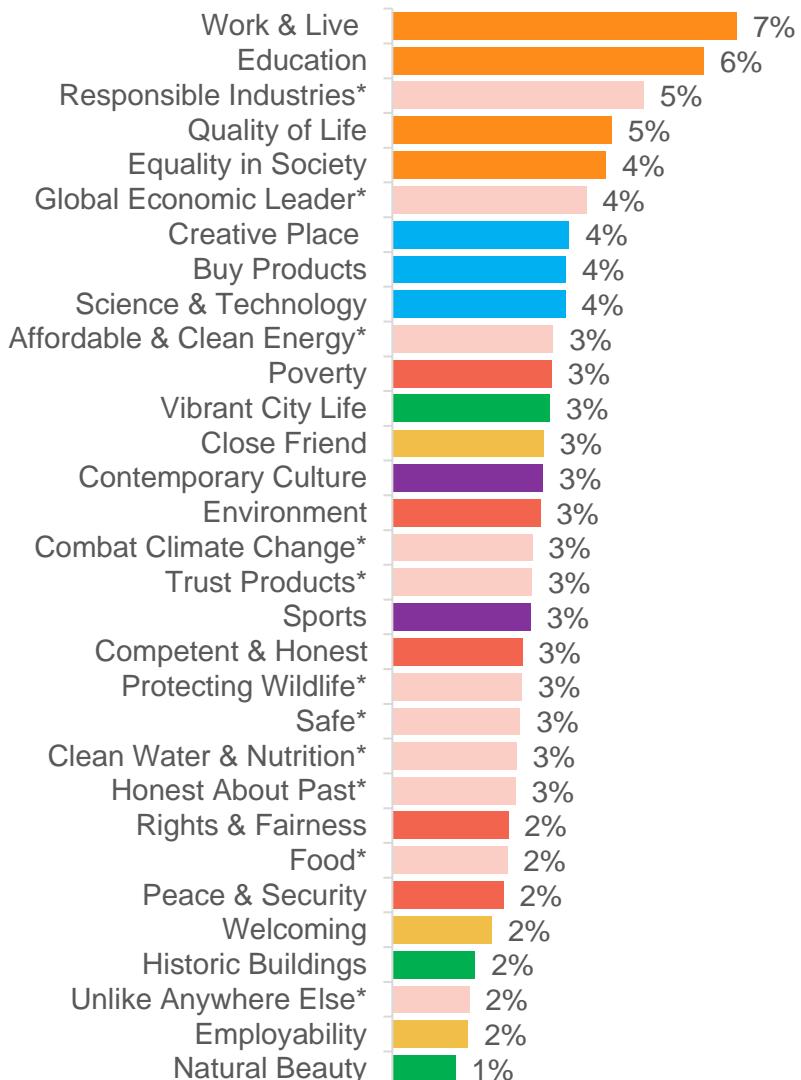
Global Desire to Invest Drivers

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.



= *new attributes added in 2023**

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



Global Desire to Invest Drivers

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

Attribute	Importance	Top Three Nation Rankings		
		1 st	2 nd	3 rd
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



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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Attribute Key



Full 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



Shortened Attribute

Attribute Key – New Common Interest Questions



Full Attribute

This country is taking action to combat climate change.
This country is working hard towards affordable and clean energy.
This country is focused on protecting wildlife and restoring habitats.
This country is focused on access to clean water and nutrition for all.
This country encourages more responsible industries that do not damage the environment.
I trust the products that are made in this country.
I think of this country as a global economic leader.
This country's food is good.
This country is honest about its past.
I would feel safe in this country.
This place is unlike anywhere else.



Shortened Attribute

Combat Climate Change
Affordable & Clean Energy
Protecting Wildlife
Clean Water & Nutrition
Responsible Industries
Trust Products
Global Economic Leader
Food
Honest About Past
Safe
Unlike Anywhere Else

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

About Ipsos

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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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