



Llywodraeth Cymru  
Welsh Government

RESEARCH

# The Anholt Ipsos Nation Brands Index: 2020 report for Wales (summary)

This report summarises the findings from the Welsh Government's subscription to include Wales on the 2020 Anholt-Ipsos Nation Brands Index SM (NBI).

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# Contents

## Aims and methodology

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## Findings

---

## Contact details

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## Aims and methodology

The NBI is an annual global nation brand survey which assesses a nation's overall image and reputation across six dimensions of national competence, all of which are treated equally:

1. Exports
2. Governance
3. Culture
4. People
5. Tourism
6. Immigration and investment

Together, the findings from these dimensions provide an overall indication of a nation's reputation. The overall NBI score is an average score of the dimensions listed above. There are between 3 and 5 attribute statement questions for each of the dimensions measured. Across the six dimensions, respondents scored 23 attributes.

The 2020 NBI examined the image of 50 nations by conducting interviews in 20 core panel countries. In all, 20,019 interviews were conducted, with at least 1,000 completed in each panel country. Respondents were adults aged 18 and over, each interviewed via online survey. The 20 core panel countries represented major advanced and emerging economies that play important and

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diverse roles in international relations and trade, as well as in the flow of business, culture and tourist activities. Wales was also included as an additional 21<sup>st</sup> panel country, with 500 respondents from Wales sampled, who answered the same questions as the 20 core panel countries.

Twenty-twenty was Wales' first year to be included on the NBI. The aim of the research was to provide an indication of Wales' reputation internationally and globally. How a country is viewed internationally can have an effect on its relations with other countries, and its business, trade and tourism efforts. Recognising this, and in line with the well-being Goals of the Well-being of Future Generations Act, the International Strategy (WG 2020) and Economic Action Plan set out ambitions to increase Wales' global profile as a place in which to invest, work, live, visit and study.

The NBI report provides a snapshot of people's attitudes towards and perceptions of Wales. Attitudinal data like this can strengthen understandings of how Wales is viewed internationally, and also how people in Wales view their home nation, helping build better understandings of Wales' reputation both globally and internally.

Individually, the rank and scores findings may deliver different messages about Wales' reputation. Read together, the rank and scores provide an overall indication of Wales' reputation.

- The score is an indicator of a nation's reputation, can be used to track reputation over time, and is presented as an average out of 100.
- The rank is an indicator of a nation's reputation relative to other countries, and refers to the nation's position between 1 and 50, where 1 is the highest rank.

High scores from a core panel country do not necessarily indicate a high ranking from that country and vice versa, so looking at them together is useful.

This research should be viewed as exploratory. The NBI is not an evaluation of Welsh Government or any delivery agency/arm of government activity or performance. The analysis provides a generalisable set of findings on levels of global awareness and views of a nation. It provides an assessment of a nation's

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brand reputation based on a snapshot of respondents' views across the dimensions and attributes measured. However, the NBI does not explore why respondents feel the way they do, or why changes in reputation might happen over time.

## Findings

### Wales' Overall Position on the 2020 NBI

Wales ranked in 21<sup>st</sup> place overall out of 50 countries, in the upper half of the NBI, with an overall score of 60.6 (out of 100). Countries which scored higher than Wales were, in the main, high income democracies, mostly in Western Europe.

Wales' reputation in 2020 was strongest in the UK (rank: 7<sup>th</sup>, score: 65.0), followed by Australia and France; and weakest in India (rank: 38<sup>th</sup>, score: 68.7), followed by China then Turkey.

### Familiarity with Wales

A total of 53% respondents were familiar with Wales. Wales ranked in the bottom ten of the 50 countries included on the 2020 NBI in terms of overall familiarity, ranking in 45<sup>th</sup> position.

Respondents who had some exposure to Wales, having visited for business and/or on holiday or through visiting a Welsh website, older respondent (aged 45 years or over) and Business/Executives' (compared to those in 'other' occupations) tended to score Wales higher in terms of familiarity.

### Favourability towards Wales

With a mean favourability of 4.66 (on a 1.0 to 7.0 point scale), Wales achieved an above average favourability, ranking 21<sup>st</sup> out of the 50 NBI nations, with a

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score of 61.4 out of 100. The more familiar a respondent was with Wales, the higher their favourability score.

Respondents from neighbouring and English-speaking countries (the UK, Australia and Canada in particular) were more familiar with Wales and tended to rank Wales higher in terms of favourability, relative to other countries.

## Wales' six dimensions of reputation

The six dimensions are:

1. Exports
2. Governance
3. Culture
4. People
5. Tourism
6. Immigration and investment

Reading across the dimensions, Wales was rated consistently, ranking around the middle of the NBI, with its position ranging from 19<sup>th</sup> to 29<sup>th</sup> place. Wales ranked as a top-30 country in each of the six dimensions, and in the top-25 for four of the six dimensions.

Wales' rankings for each of the dimensions are listed below, from highest and best performing dimension, to lowest.

- Governance was Wales' best performing dimension, where it ranked 19<sup>th</sup> out of 50 nations, with a score of 60.6, and achieved its best ranking attribute, for "competently and honestly governed" (17<sup>th</sup>).
- Immigration and Investment was the dimension Wales performed second best in, where it ranked in 20<sup>th</sup> place, achieving a score of 57.9.
- For People, Wales again ranked in the top-half of the nations measured, with a ranking of 21<sup>st</sup> place, and a score of 63.5.
- Wales ranked in the middle of the index for Tourism, in 25<sup>th</sup> place, with a score of 64.4. Wales' lowest overall ranking attribute was under this dimension, for its "vibrant cities" (31<sup>st</sup>).

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- Wales ranked in 26<sup>th</sup> place for Exports, with a score of 54.4.
- Wales' lowest ranked dimension was for Culture, where its low score relative to other nations for the “excels at sports” attribute helped contribute to it ranking in 29<sup>th</sup> place, with an overall dimension score of 57.9.

## Wales' perceptions of Wales

500 respondents among the online population based in Wales were asked the same questions as the core panel countries.

- Respondents from Wales ranked Wales in 2nd position overall, behind the UK in 1<sup>st</sup> place, and in front of Scotland, which was ranked 3<sup>rd</sup>.
- For favourability, Wales ranked itself in 1<sup>st</sup> place with a score of 6.4.
- Wales ranked itself within the top-3 out of 50 nations for each of the six dimensions, scoring itself highest (79.5), and ranking in 1<sup>st</sup> position overall, for People, and lowest for Exports, in 3<sup>rd</sup> place (70.0).
- Wales' top global concern was protecting and preserving the environment (42%).

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