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The Anholt Ipsos Nation Brands Index: 2023 Report for Wales

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The Anholt Ipsos Nation Brands Index: 2023 Report for Wales

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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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1. Background

- 1.1 This report outlines the findings from the Welsh Government's subscription to the 2023 Nation Brands Index (NBI) to measure Wales' reputation internationally and domestically. The NBI is an annual online global panel survey which examines the image of 60 nations. In 2023, the NBI was conducted in 20 core panel countries. The core panel countries represented 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.
- 1.2 In 2023, Wales was included on the Anholt-Ipsos NBI. The findings for Wales presented in this report reflect the views and opinions of the online population in these 20 core panel countries during the fieldwork period and should be considered as a snapshot of that point in time.
- 1.3 The NBI aims to assess a country's overall image and reputation across six dimensions of national competence all of which are treated equally. The six dimensions are: 'Exports', 'Governance', 'Culture', 'People', 'Tourism' and 'Immigration and Investment'. There were two elements to Wales' inclusion on the 2023 NBI: how Wales is perceived by an online sample of respondents from the 20 core panel countries; and how an online sample of respondents living in Wales perceive Wales.
- 1.4 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, the Welsh Government's [International Strategy](#) (WG 2020) describes Wales as a small country with big ambitions. The Strategy sets out three core goals and its vision internationally for the next five years, to help position Wales for the challenges of the future; namely, to: raise Wales' profile on the international stage; grow the economy by increasing exports and attracting inward investment; and establish Wales as a globally responsible nation.
- 1.5 The [Well-being of Future Generations \(Wales\) Act](#) (2015) aims to improve the social, economic, environmental and cultural well-being of Wales. The Act sets out five Ways of Working for the listed public bodies to achieve the vision set out under the Act's seven Well-being Goals; the vision being to help "create a Wales we all

want to live in, now and in the future” (WG 2015). The goals of delivering ‘A Globally Responsible Wales’ and ‘A Prosperous Wales’, for example, are fundamental government objectives under the Act; and encouraging participation from the public has been identified as key to achieving the seven goals.

- 1.6 Responding to the goal for ‘A Prosperous Wales’, the Welsh Government’s [Economic Action Plan, Prosperity for All](#), seeks to improve Wales’ economic structures. As well as pointing to huge structural challenges within Wales’ economy, external challenges are raised, such as: exiting the European Union (EU); the opportunities and challenges of Wales’ transition to a low-carbon economy; and the importance of building on the unified brand for Wales as a place in which to invest, work, live, visit and study.
- 1.7 Within a changing global context, including uncertainties raised by the impacts of global events, there is a need to better understand how Wales is perceived by other countries. The NBI’s six dimensions of national competence are weighted equally. Individually, the rank and scores findings for Wales may deliver different messages about Wales’ reputation. Read together, the rank and scores provide an overall indication of a country’s reputation:
 - The **rank** is informative of a country’s reputation relative to other countries and may change over time in relation to other countries’ performance.
 - The **score** may be regarded as an indicator of a country’s reputation, which can be used to track a country’s reputation over time.
- 1.8 The NBI data 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.
- 1.9 The NBI is not an evaluation of Welsh Government or any delivery agency/arm of government activity nor an indicator of government performance. The NBI is a short survey about Wales in its broadest sense. The data should be read in context and understood alongside other information around the delivery of Welsh Government

goals. Further detail on data considerations and limitations to the research is provided in the Methodology section.

Report Structure

1.10 The structure of this report is as follows:

- The preceding paragraphs, on Background, presented contextual information about Wales' inclusion on the 2023 NBI.
- The Methodology section sets out the aims and objectives and methodological approach of the research and includes a summary of data considerations and limitations to bear in mind when interpreting findings for Wales.
- The Findings section outlines key findings based on an analysis of summary data provided by the supplier, Ipsos USA.
- The Conclusions section provides an overview of key findings from the research and outlines conclusions for Wales.

2. Methodology

- 2.1 This section provides an overview of the methodological approach and quality control procedures adopted by Ipsos for the 2023 NBI survey. Conducted annually beginning in 2008, the Anholt-Ipsos NBI examines the image of 60 nations. Each year, approximately 60,000 adults, aged 18 and over, in 20 core panel countries are surveyed online. The Welsh Government subscribed to include Wales on the 2023 NBI survey. An overview of the 2023 NBI questionnaire is at Annex A.
- 2.2 In 2021, the NBI expanded from 50 nations to 60 nations. This expansion of participating nations has been accompanied by an expansion in the number of adults surveyed. In 2020, approximately 20,000 adults were surveyed, compared to 60,000 in 2023. When comparing rankings across 2020 and 2023, the expansion of the NBI during this period should be kept in mind, as changes in rank are at least partially attributable to this expansion.

NBI Data

- 2.3 There are three levels of data presented in this report. At the NBI level, the data measures the 60 NBI nations overall image and reputation, worked out as an average of the six dimensions assessed in the survey: 'Exports', 'Governance', 'Culture', 'People', 'Tourism' and 'Immigration and Investment'.
- 2.4 At the dimensions level, the overall figures for each individual dimension are a composite of attribute results, grouped by dimension theme. For example, 'Exports' figures are an average of the responses to the three questions relating to 'exports'.
- 2.5 At the attributes level, the figures are the results from individual statements respondents were asked to answer in the survey. For example, one of the three questions/statements for 'Exports' was "Wales is a creative place with cutting-edge ideas and new ways of thinking".
- 2.6 A description of each of the six dimensions and their underlying attributes or question areas is in Table 1.

Table 1: 2023 Nation Brands Index, Dimension Outline

Dimension	Attributes Measured
Exports	<ol style="list-style-type: none">1) Respondents view of a nation's contribution to innovation in science and technology2) Whether respondents feel better/worse about buying products/services knowing they are from each nation3) Whether respondents think each nation is a creative place with cutting-edge ideas and new ways of thinking
Governance	<ol style="list-style-type: none">1) Whether respondents think each nation is competently and honestly governed2) Whether respondents think each nation respects the rights of its citizens and treats them with fairness3) Whether respondents think each nation behaves responsibly in international peace and security4) Whether respondents think each nation behaves responsibly to protect the environment5) Whether respondents think each nation behaves responsibly to help reduce world poverty
Culture	<ol style="list-style-type: none">1) Whether respondents feel each nation excels at sports2) Whether respondents feel each nation has a rich cultural heritage3) Whether respondents consider each nation as an interesting/exciting place for contemporary culture such as music, films, art and literature
People	<ol style="list-style-type: none">1) Whether respondents felt that people from each nation would make them feel very welcome2) Whether respondents would like a person from each nation as a close friend3) Respondents' willingness to hire well-qualified people from each nation
Tourism	<ol style="list-style-type: none">1) Whether respondents would like to visit a nation if money was no object2) Whether respondents feel each nation is rich in natural beauty3) Whether respondents think each nation is rich in historic buildings and monuments4) Whether respondents think each nation has a vibrant city life and urban attractions

Immigration and Investment	1) Respondents' willingness to live and work for a substantial period in each nation 2) Whether respondents consider each nation as a place with a high quality of life 3) Whether respondents feel each nation is a good place to study for educational qualifications 4) Whether respondents feel each nation has businesses they would like to invest in 5) Whether respondents feel each nation cares about equality in society
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2.7 Data are presented in two formats in this report:

- Rank: 60 nations were included in the 2023 NBI. Where a rank is noted for Wales, this refers to the nation's position between 1 and 60, where 1 is the highest rank, placing 1st amongst all 60 nations measured.
- Score: The NBI score is presented as an average out of 100 of the six dimension scores.
 - At the dimension level, each dimension is an average of the attribute statement/question scores converted into a scale from 1 to 100.
 - There were between three and five attributes used to calculate the scores for each dimension (see Table 1). Respondents answered the statements for each attribute measured on a Likert scale of 1.0 to 7.0, with 1.0 being the lowest and worst and 7.0 the highest and best (and 4.0 being the middle neutral position). To aid readability across the findings from the individual attribute statements and the overall indexed score for each dimension, the mean averages from the 7 point Likert scale for each of the attributes have been converted into a score out from 1 to 100, mirroring the methodology used by Ipsos-Mori to convert attribute scores into an overall dimension score. The conversion scores are outlined in Table 2.¹ The Likert scale mean for each attribute statement by dimension scored is presented at Annex B.

¹ Because scores are converted to a scale of 1 to 100, not 0 to 100, dimension and attribute

- At the start of the survey, respondents were asked to rate how well they felt they knew the 60 NBI nations. Familiarity was measured on a 5-point Likert scale, with 1.0 being the least familiar or lowest familiarity score (“never heard of”) and 5.0 being the most familiar or highest familiarity score (“very well”) (see Annex A). Familiarity is presented as the percentage of respondents who had at least some knowledge of Wales.
- Respondents were also asked to rate their favourability towards the 60 NBI nations. Favourability was measured on a 7-point Likert scale, with 1.0 being extremely unfavourable or the lowest favourability score, and 7.0 being extremely favourable or the highest favourability score. Levels of favourability towards Wales are presented as the mean score out of 7.0.

Table 2: Conversion from 7-point Likert Scale to Score out of 100

7-point Likert Scale	Converted score, 1 to 100
1.0	1.00
2.0	17.50
3.0	34.00
4.0	50.50
5.0	67.00
6.0	83.50
7.0	100.00

Sample Design and Fieldwork

Survey Panel Countries

- 2.8 Approximately 60,000 respondents from 20 core panel countries participated in the 2023 NBI survey. The 20 core panel countries were chosen to provide regional balance and a mix of high-income and middle-income countries, given the increasing global role played by developing nations. Consistency between survey

waves was also considered by Ipsos. The 20 core panel countries in 2023 were the same as in previous years of the NBI.²

2.9 The 20 core panel countries are listed by region in Table 3.

² Saudi Arabia replaced Egypt as a panel country in 2021. Otherwise, the 20 core panel countries are unchanged from NBI 2020.

Table 3: 2023 Nation Brands Index, 20 Core Panel Countries by Region

Region	Sub-region	Countries
North America		Canada, United States
Europe	Western Europe	France, Germany, Italy, Sweden, United Kingdom
	Central and Eastern Europe	Poland, Russia, Turkey
Asia-Pacific		Australia, China, India, Japan, South Korea
Latin America		Argentina, Brazil, Mexico
Middle East / Africa		Saudi Arabia, South Africa

2.10 This report reflects the views and opinions of online populations in the countries listed in Table 3.

2.11 A map highlighting the 20 core panel countries by region is at Figure 1.

Figure 1: 2023 Nation Brands Index, Map of the 20 Core Panel Countries



The core 20 panel countries:

North America

The United States, Canada

Western Europe

The United Kingdom, 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

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Wales as a 21st Panel Country

2.12 Wales was included as an additional proprietary 21st panel country to explore how Wales sees itself. An additional sample of 500 respondents among the online population based in Wales were asked the same questions as the core panel countries.³ These figures are not included in Wales' total scores and ranks presented in the Findings Section, below. The survey was delivered bilingually in Welsh and English in Wales.

³ The data collected from these respondents are exclusively for Welsh Government. Therefore, this information has not been shared with any other organisations subscribed to the 2023 NBI.

NBI nations

- 2.13 The 2020 NBI measured the image of 60 nations. These 60 nations were included based on their political and economic importance, and to reflect regional balance. To a lesser extent, the diversity of political and economic systems was also considered. Subscribing organisations' interests were also reflected in the selection of NBI nations. The 60 NBI nations are listed at Table 4 by region.

Table 4: 2023 Nation Brands Index, 60 NBI Nations by Region

Region	Countries
North America	Canada, United States
Western Europe	Austria, Belgium, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Northern Ireland, Norway, Portugal, Scotland, Spain, Sweden, Switzerland, United Kingdom, Wales
Central and Eastern Europe	Czech Republic, Hungary, Poland, Romania, Russia, Slovakia, Turkey / Türkiye, Ukraine
Asia-Pacific	Australia, China, India, Indonesia, Japan, New Zealand, Philippines, Singapore, South Korea, Taiwan, Vietnam
Latin America	Argentina, Brazil, Chile, Colombia, Dominican Republic, Ecuador, Mexico, Panama, Peru
Middle East / Africa	Botswana, Egypt, Israel, Jordan, Kenya, Morocco, Qatar, Saudi Arabia, South Africa, Tanzania, United Arab Emirates

- 2.14 A map highlighting the 60 NBI nations by region is at Figure 2.

Figure 2: 2023 Nation Brands Index, Map of the 60 Measured Nations by Region



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

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Respondent Selection and Weighting

- 2.15 Based on the most up-to-date online population parameters in each country, the sample frame in each country was weighted to reflect key demographic characteristics, such as age, gender and education, of the 2023 online population of that country. Additionally, in the United States (US), the United Kingdom (UK), South Africa, India and Brazil race and/or ethnicity was used for sample balancing.
- 2.16 The 2023 NBI findings reflect the views and opinions of the online populations in the participating countries during the fieldwork period.

- 2.17 Ipsos' in-house sampling and statistics department calculated weights for each country. So each country was treated equally in the global average, when computing the aggregated country average, "one country one vote" weighting was applied as the achieved sample sizes varied slightly across survey countries.

Online Panel Survey Recruitment

- 2.18 Large, pre-recruited and regularly updated online panels were used for the 2023 NBI survey. Quality control procedures, such as frequent respondent identity verification, were practiced (see paragraph 2.17).
- 2.19 Using statistics around each core panel country's online population, the sample frame in each country was stratified by six sample cells: males aged 18-34, 35-54, and 55+, and females aged 18-34, 35-54, and 55+. For each cell, random sample replicates were proportionally drawn and invitation emails sent inviting panellists to participate in the survey.
- 2.20 Across the 20 core panel countries, the list of 60 NBI nations was randomly assigned to respondents. Each respondent rated 10 of the 60 NBI nations, resulting in each NBI nation receiving approximately 500 ratings per core panel country.

Survey Fieldwork and Response

- 2.21 Across the 20 core panel countries, in total, 60,072 respondents completed the 2023 NBI survey. In each core panel country, at least 3,000 adults (aged 18 or over) who were internet users were surveyed.
- 2.22 Fieldwork was conducted from 27th June to 3rd August 2023 for all 20 core panel countries and additional proprietary panel countries (e.g. Wales).

Fieldwork Quality Control

- 2.23 Online surveys are self-administered and are therefore at a higher risk of respondent error or falsification than telephone or face-to-face surveys administered by trained interviewers. To help mitigate this, Ipsos undertook data validation and cleaning as part of their survey quality control. "Speeders" (respondents who complete the survey in an unreasonably fast amount of time) were removed from the sample, as well as respondents who engaged in "straightlining" (clicking through a survey giving the same answers for each item). Offending respondents'

questionnaires were removed from the data-file and replacement panellists were added. Additionally, security measures were taken at the panel level, including IP address validation, bot detection, and checks for duplicate respondents.

General Panel Maintenance and Panel Quality Control

2.24 The NBI survey is distributed via email. For the 2023 NBI, strict verification and cleaning processes were in place for online panel quality control purposes. These processes included the removal of lapsed panellists and undeliverable emails from the sample. The ongoing monitoring systems of the panels also identified potential fraudulent behaviour based on survey-taking activities and patterns, with offending panellists removed.

2.25 Panel operators typically employed a variety of incentive approaches depending on the panel country. This included: donations to charity on behalf of panellists, sweepstakes, points, gift cards, prizes, music downloads and cash payments.

Data Considerations of the Research

2.26 There are some data considerations which have a bearing on the analysis and reporting of findings:

- Wales first became a participating country in the NBI in 2020. With that in mind, this research should be viewed as exploratory. Reputational change takes a long time.
- The NBI provides a snapshot of respondents' familiarity with and perceptions of a nation against a broad range of measures (see Annex A). The analysis provides a generalisable set of findings on levels of global awareness and views to provide an assessment of a nation's brand reputation. However, the NBI does not explore why respondents feel the way they do, or why changes in reputation happen over multiple years.
- Respondents from Wales are included in two of the 2023 panels assessing countries reputations: 500 respondents in the "Wales' perceptions of Wales" element of the research (i.e. Wales as an additional proprietary panel

country); with 126 respondents from Wales also included among the 3000 (4%) UK core panel country sample.

- Findings on how people living in Wales perceived Wales are only reported in the findings section titled “Wales’ perceptions of Wales”. Findings from Wales as an additional proprietary 21st panel country are not included in the general NBI findings. The core panel countries are listed at Table 3.
- The data shows that those respondents who reported having had more exposure to Wales tended to have a more positive image of the nation; but from the NBI, it is not possible to discern when this exposure happened.
- Due to the scope and coverage of the NBI, key demographic characteristics are limited. Greater focus has therefore been given to the relationship between respondents’ familiarity with Wales and their scoring of Wales. Tables outlining the 2023 NBI dimension and attribute findings for Wales by familiarity and existing relationships with Wales are at Annex B.
- A high score from a country does not necessarily indicate a high ranking from that core panel country and vice versa.⁴ The rank is informative of a country’s reputation relative to other countries, and therefore is responsive to changes in the sample of evaluated countries while the absolute score is not. The scores and ranks should be looked at together, as individually they may deliver different messages about perceptions of Wales.
- The analysis is based on summary data aggregated from responses and there may be discrepancies with the raw data due to, for example, rounding or aggregation. Scores have been rounded to one decimal place.
- The NBI assesses a country’s reputation across the six dimensions of ‘Exports’, ‘Governance’, ‘Culture’, ‘People’, ‘Tourism’ and ‘Immigration and Investment’. However, the dimensions measured are complex concepts and, in some cases, may have overlapping boundaries and/or different meanings for respondents.

⁴ For example, for Wales’ overall reputation, India provided Wales with its third highest overall score, but ranked Wales in its joint lowest position (tied with Russia).

- Dimension findings are presented as a score out of 1 to 100, calculated as an average of the scores given for the underlying questions.⁵

⁵ For example, the 'Exports' dimension is calculated as an average score of its component or underlying attributes; specifically responses to the three questions: 1) views on a country's contribution to innovation in science and technology; 2) whether knowing where a product is made increases or decreases the likelihood of it being purchased (also known as the 'country of origin effect'); and 3) the extent to which a country is recognised as a creative place with cutting-edge ideas and new ways of thinking.

3. Findings

Wales' Overall Position on the 2023 NBISM

3.1 The NBI is comprised of six dimensions. The scores a nation receives for the six dimensions determine the nation's overall rank and score. In 2023, Wales ranked 23rd overall out of 60 countries, placing it in the top half of the NBI.⁶ Wales' overall NBI score was 62.4 out of 100.⁷ This score is three deciles behind the top scored country and five deciles above the country with the lowest score.⁸ Additionally, Wales' overall score is higher than the mid-point of the highest and lowest scores (59.2).⁹

Table 5: Wales' Overall NBI Rank (2020 to 2023)

Measure	2020	2021	2022	2023
Rank	21	22	22	23

3.2 Table 5 shows Wales' overall NBI rankings from 2020 to 2023. Rankings have remained largely stable, with a slight decrease from 21st place in 2020 to 23rd place in 2023. It should be noted that in 2020, only 50 nations participated in NBI, whereas from 2021 onwards, 60 nations have participated each year. Changes in rank for Wales from 2020 to 2023 are at least partially attributable to the expansion of the NBI during this period.

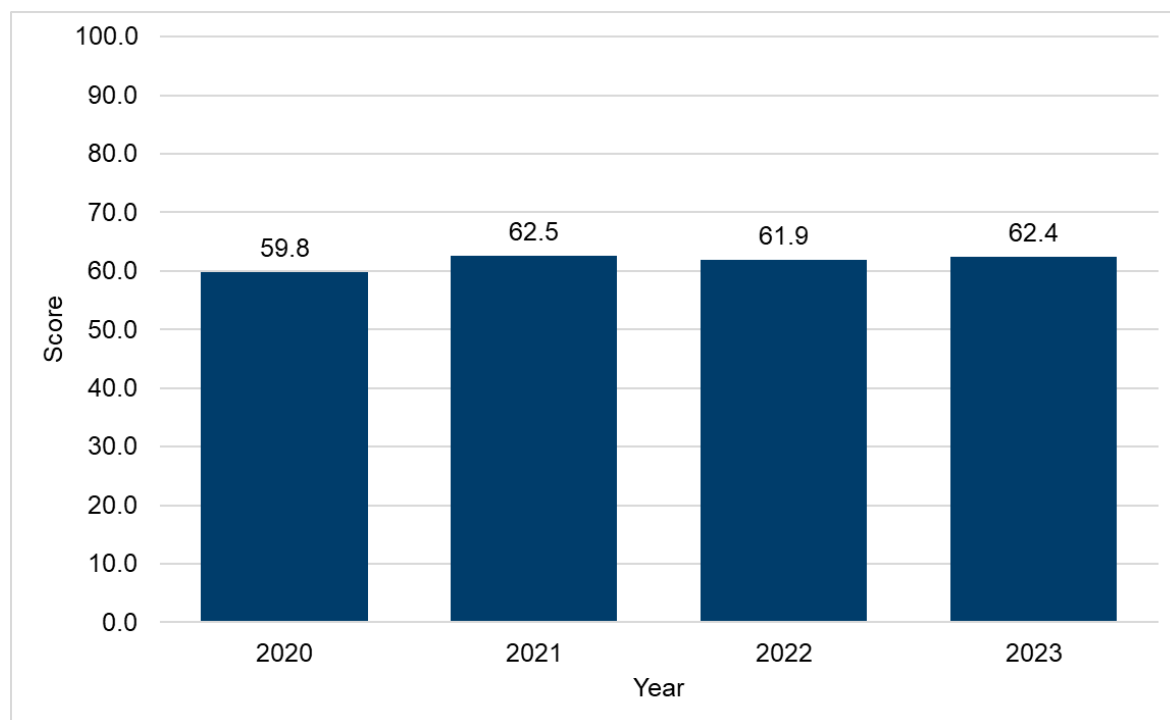
⁶ The top ten highest ranked countries in 2023 were, in descending order, Japan (1), Germany (2), Canada (3), United Kingdom (4), Italy (5), United States (6), Switzerland (7), France (8), Australia (9), and Sweden (10). Countries that were ranked 11 or below cannot be published under the conditions of the NBI subscription agreement.

⁷ Figures have been rounded to one decimal place.

⁸ A decile is a quantitative method of splitting up a set of ranked data into 10 equally large subsections. A decile rank arranges the data in order from lowest to highest and is done on a scale of one to 10 where each successive number corresponds to an increase of 10 percentage points.

⁹ The mid-point referred to here is the 50th decile.

Figure 3: Wales' Overall NBI Score (2020 to 2023)



- 3.3 Figure 3 shows Wales' overall NBI scores from 2020 to 2023. Scores have remained broadly stable during this period, with Wales recording its highest score of 62.5 in 2021. Scores in 2022 and 2023 were slightly lower than the score recorded in 2021, but higher than the score recorded in 2020 (59.8). Additionally, Wales' score in 2023 (62.4) was higher its score in 2022 (61.9).
- 3.4 Wales' overall NBI rank in 2023 was lower by two places, compared to 2020 (21st). However, 2023 saw an increase in Wales' overall NBI score, from 59.8 in 2020. This illustrates the importance of distinguishing between rankings and scores. Changes in rank do not necessarily reflect changes in scores, and vice versa, and ranks and scores may present different messages about Wales' reputation. Therefore, it is important to consider scores and ranks together, in order to understand the overall findings. Additionally, although Wales' NBI score increased by 0.5 points between 2022 and 2023, this increase is below the global average

increase of 0.9 points across NBI nations, indicating that this increase in score is does not necessarily demonstrate a true shift in global perceptions of Wales.¹⁰

- 3.5 Further discussion of the 2023 NBI rankings and scores across the 60 countries can be found in the [Ipsos Press Release](#).

Wales' Reputation in the 20 Core Panel Countries

- 3.6 Figure 4 shows the overall NBI rankings received by Wales from each of the 20 core panel countries. On average, the regions where Wales' reputation was strongest were Western Europe and North America. The highest rankings for Wales came from the UK, Australia, Sweden and Canada. Wales was ranked 12th by the UK (65.7), 17th by Australia (65.5), and 21st by both Sweden (63.3) and Canada (62.9).
- 3.7 Wales' reputation was weakest in India and Russia (ranked 44th in both), followed by Saudi Arabia (38th).

¹⁰ [The Anholt-Ipsos Nation Brands IndexSM Press Release Supplemental Report, November 2023](#), page 13. Please note that these are changes in average scores from 2022 to 2023, rather than from 2020 to 2023.

Figure 4: Wales' Overall NBI Rank by Core Panel Country (2023)

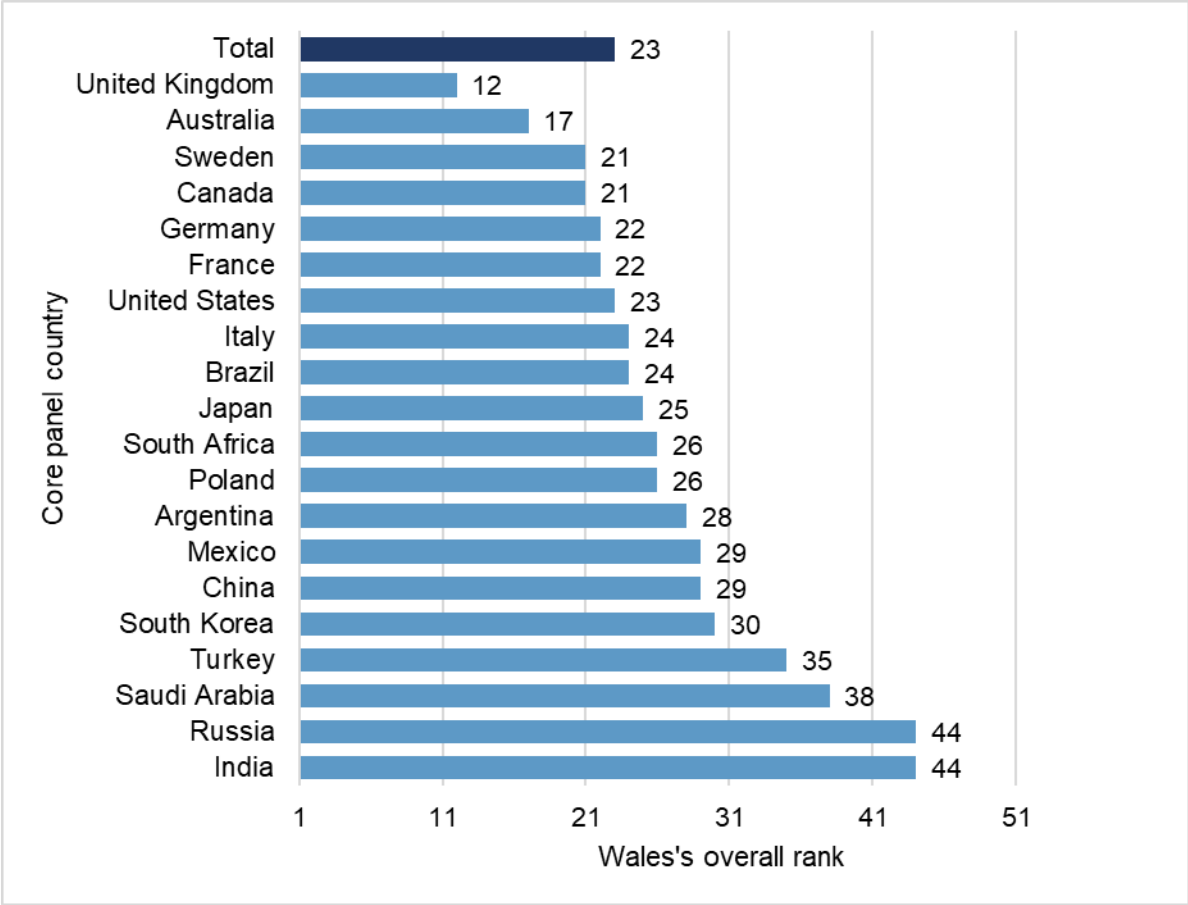
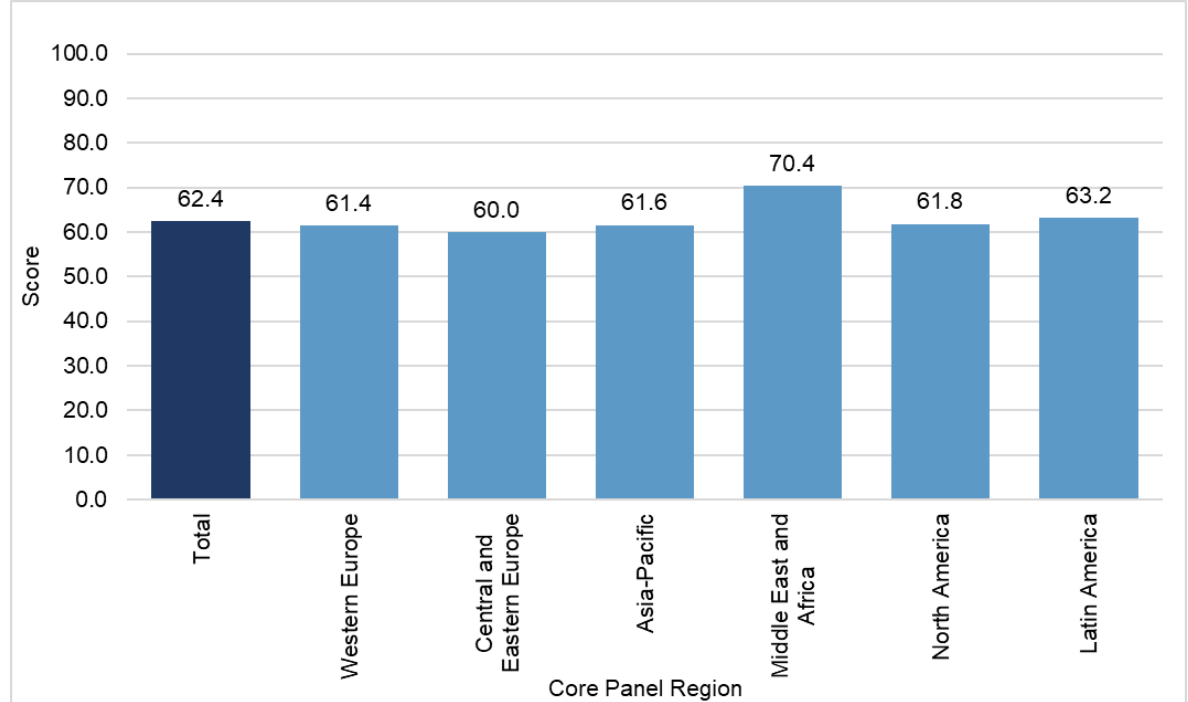


Figure 5: Wales' Overall NBI Score by Core Panel Region (2023)



- 3.8 Figure 5 illustrates the average overall scores given to Wales by each region. On average, the regions that gave Wales the highest overall scores were the Middle East and Africa (70.4), followed by Latin America (63.2), North America (61.8), Asia-Pacific (61.6) and Western Europe (61.4). Central and Eastern Europe was the region that gave Wales the lowest overall score on average (60.0).
- 3.9 In contrast to rankings, the highest overall scores received by Wales in 2023 were from South Africa (71.2), Saudi Arabia (69.6), and India (66.5). Although India and Saudi Arabia gave Wales some of its lowest rankings, they also gave Wales some of its highest scores. The lowest overall scores for Wales were from Japan (51.3), Russia (54.9), and South Korea (58.3).
- 3.10 The countries that gave Wales its highest rankings in 2023 are largely unchanged from those that did so in 2020. However, Wales' third highest ranking in 2020 came from France (18th), whereas in 2023, France gave Wales its sixth highest ranking (22nd). Notably, Wales received a considerably lower ranking from Russia in 2023 compared to 2020 (28th in 2020, compared to 44th in 2023).¹¹ Additionally, Wales received lower overall NBI rankings from the majority of the 20 core panel countries in 2023, compared to 2020. It should also be noted that in 2023, 60 nations participated in NBI, whereas only 50 participated in 2020. Therefore, it is likely that changes in rank for Wales between 2020 and 2023 are at least partially attributable to the expansion of the NBI during this period.

Favourability and familiarity

Familiarity

- 3.11 At the beginning of the 2023 NBI survey, respondents were asked to rate how well they felt they knew each country, using a scale from 1.0 to 5.0.¹² Overall familiarity is presented as the percentage of respondents who stated they knew Wales 'very

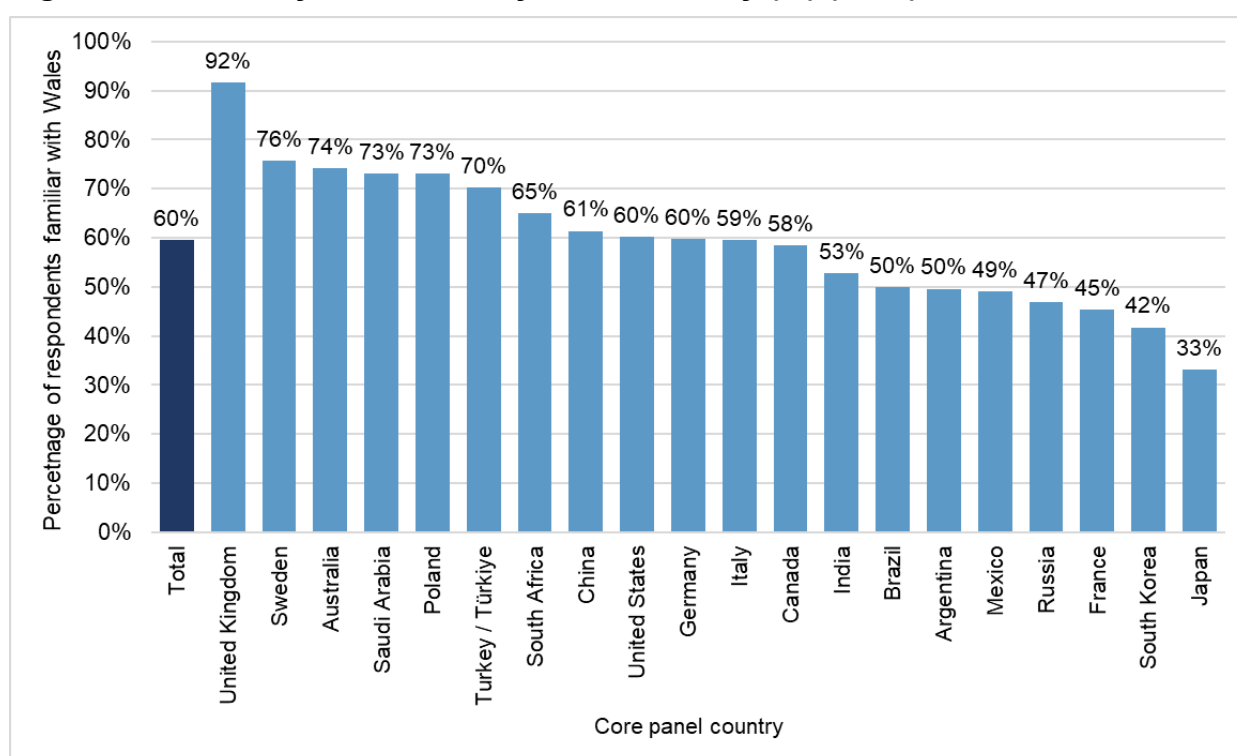
¹¹ Saudi Arabia was not one of the 20 core panel countries for NBI 2020; therefore comparisons cannot be made between Wales' reputation in Saudi Arabia in 2023 and 2020.

¹² The 2020 NBI survey used a different question to determine familiarity. In 2020, respondents were asked to indicate how familiar they were with each country, using a scale from 1.0 to 5.0. Respondents could indicate that they were 'very familiar' (5.0), 'familiar' (4.0), had 'some knowledge' (3.0), 'just [knew the] name', or '[hadn't] heard of the country' (1.0).

well’, ‘somewhat well’, or ‘just a little’.¹³ 60% of respondents reported at least some familiarity with Wales, producing a familiarity ranking of 48th out of the 60 NBI nations.

3.12 Figure 6 shows levels of familiarity with Wales across the 20 core panel countries. Familiarity with Wales was highest in the UK (92%), followed by Sweden (76%), Australia (74%), Saudi Arabia (73%), and Poland (73%). Japan (33%) and South Korea (42%) had the lowest levels of familiarity with Wales.

Figure 6: Familiarity with Wales by Panel Country (%) (2023)



3.13 On average, the regions that were most familiar with Wales were the Middle East and Africa (69%), Western Europe (66%), and Central and Eastern Europe (63%). In contrast, Latin America (50%) and Asia-Pacific (53%) were the regions with the lowest average levels of familiarity with Wales.

¹³ Similarly, the [2020 Report for Wales](#) presented overall familiarity as the percentage of respondents who stated they were ‘very familiar’, ‘familiar’, or ‘somewhat familiar’ with Wales.

Table 6: Overall Familiarity with Wales (2020 and 2023)

Measure	2020	2023	Change
% familiar with Wales	53%	60%	7%
Rank	45	48	-3

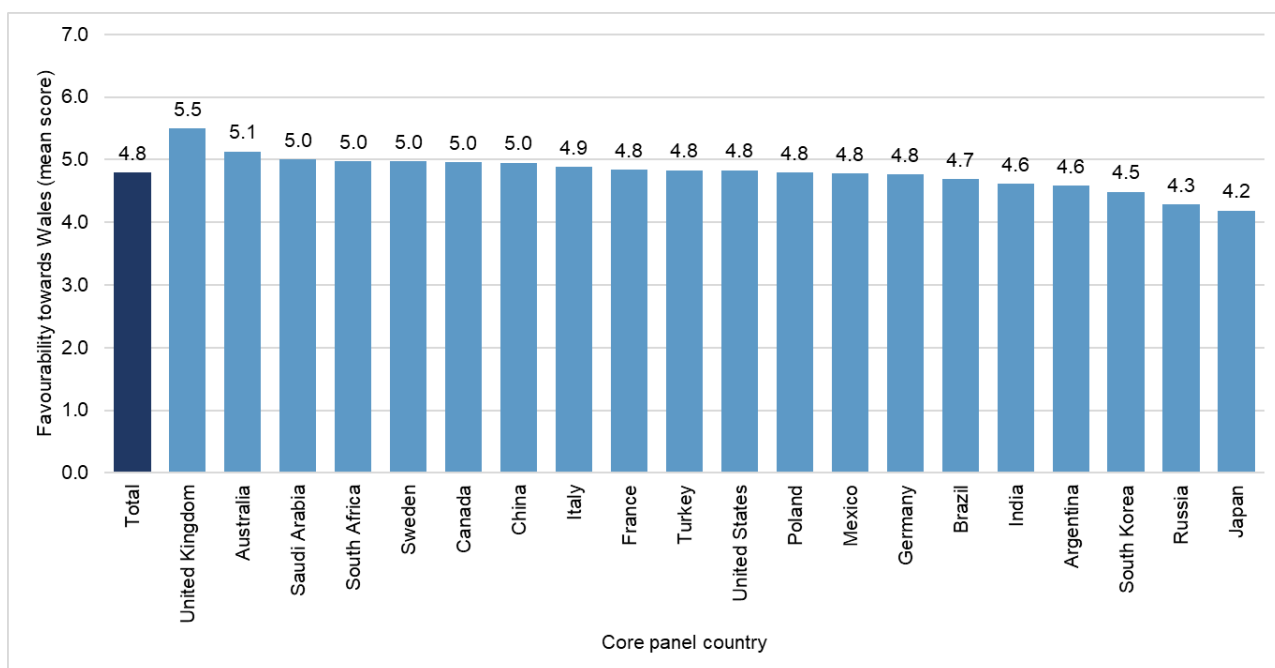
- 3.14 Table 6 compares overall familiarity with Wales in 2020 and 2023. The percentage of respondents who reported at least some familiarity with Wales in 2023 was seven percentage points higher than in 2020. However, Wales' overall familiarity ranking was three places lower in 2023, compared to 2020.
- 3.15 The profile of nations and regions with the highest and lowest levels of familiarity with Wales in 2023 is broadly similar to 2020. The UK (93%), Australia (66%) and Sweden (64%) were among the five countries with the highest levels of overall familiarity with Wales, and Japan (22%) and South Korea (25%) were the countries with the lowest. Countries in Western Europe tended to have higher levels of familiarity with Wales, except France, where 45% of respondents were familiar with Wales, both in 2020 and in 2023. France reported low levels of familiarity across the NBI nations, with familiarity averages of 47% in 2020 and 43% in 2023. Asia-Pacific and Latin America were the regions with the lowest reported levels of familiarity with Wales in 2020.
- 3.16 The Middle East and Africa appears to have increased familiarity with Wales in 2023, compared to 2020; however, this is driven by Saudi Arabia, which reported 73% familiarity with Wales in 2023. In 2020, Saudi Arabia was not a core panel country, and of the two core panel countries for the Middle East and Africa region, respondents from only one were asked about their familiarity with Wales.¹⁴ This indicates that although respondents in this region reported high average levels of familiarity with Wales in 2023, this does not necessarily reflect an actual increase in familiarity with Wales in the region since 2020.

¹⁴ In 2020, the Middle East and Africa region contained two panel countries: South Africa and Egypt. Respondents from Egypt were not asked about their familiarity with Wales.

Favourability

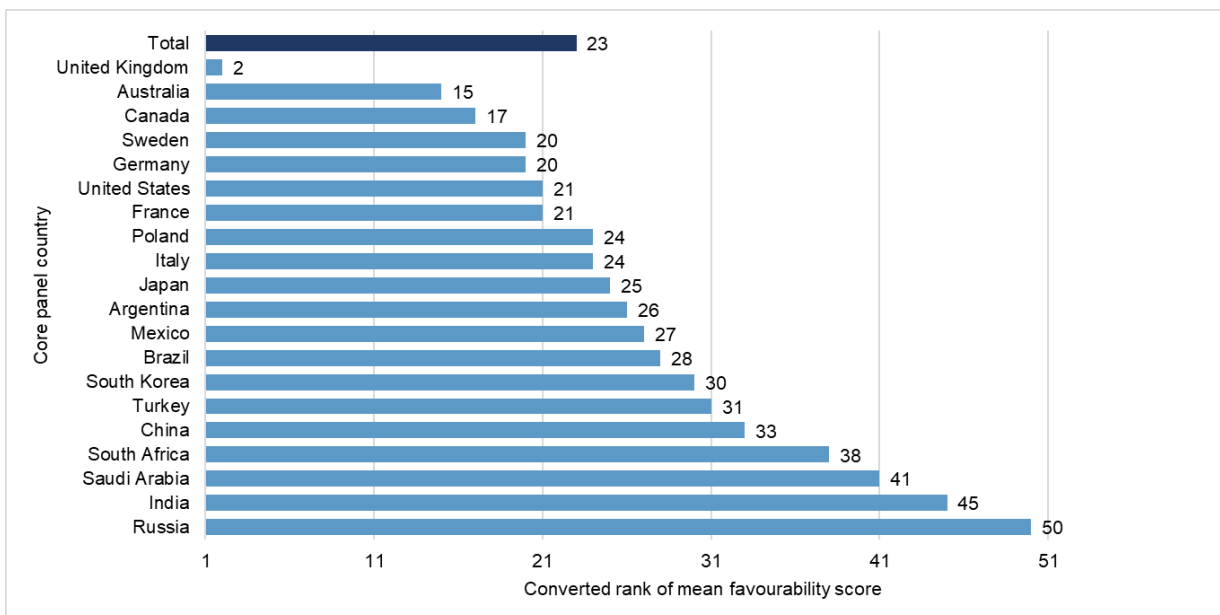
- 3.17 The NBI 2023 survey also asked respondents to rate their favourability towards Wales using a scale of 1.0 to 7.0, with 1.0 being extremely unfavourable and 7.0 being extremely favourable. Overall favourability is presented as the mean score on the favourability scale.
- 3.18 The mean favourability score for Wales in 2023 was 4.8, slightly above the scale's mid-point of 4.0 (which represented the neutral 'neither favourable nor unfavourable' option). Overall, Wales is viewed neutrally-to-positively across all 20 core panel countries, with none giving Wales a favourability score of 4.0 or less [Figure 3.5].
- 3.19 Wales received a relatively high favourability rank of 23rd out of the 60 NBI nations [Figure 7].¹⁵

Figure 7: Favourability towards Wales, panel countries mean score (2023)



¹⁵ A converted index score based on core panel country responses on the 1.0 to 7.0 favourability scale.

Figure 8: Favourability towards Wales, panel countries ranking (2023)



3.20 Figures 7 and 8 show levels of favourability towards Wales across the 20 core panel countries. The highest mean favourability scores for Wales came from the UK (5.5) and Australia (5.1). Wales also received favourability scores of 5.0 from Saudi Arabia, South Africa, Sweden and Canada. Wales’ lowest mean favourability scores were from Japan (4.2), Russia (4.3), and South Korea (4.5). The three lowest mean favourability scores received by Wales were still all above the ‘neutral’ mid-point of the scale.

3.21 Wales received its highest favourability rankings from the UK (2nd), Australia (15th), and Canada (17th). The lowest favourability rankings came from Russia (50th), India (45th), and Saudi Arabia (41st). Although Wales received a low favourability ranking from Saudi Arabia, it also received a high favourability score from the same country, demonstrating the importance of distinguishing between scores and rankings.

Table 7: Favourability towards Wales (2020 and 2023)

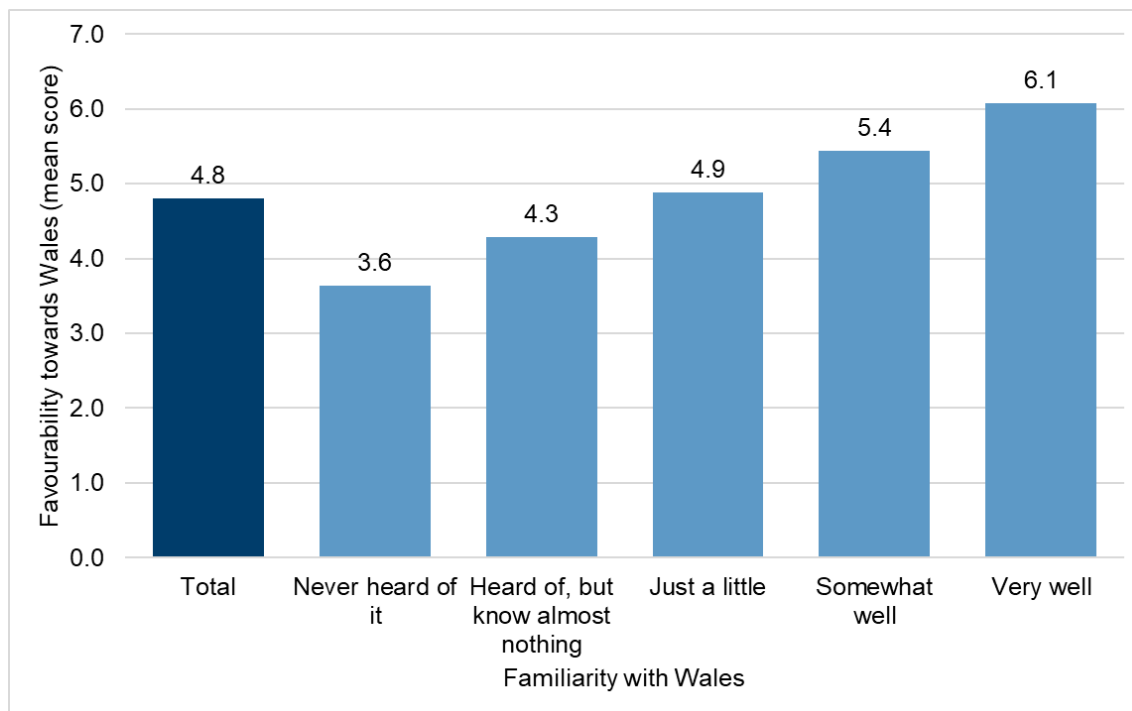
Measure	2020	2023	Change
Mean favourability score	4.7	4.8	+0.1
Rank	21	23	-2

3.22 Table 7 compares favourability towards Wales across 2020 and 2023. Wales’ mean favourability score has remained largely stable, having increased slightly from 4.7 in

2020 to 4.8 in 2023. However, Wales' favourability rank is two places lower in 2023, compared to 2020.

3.23 The profiles of countries that gave Wales its highest and lowest favourability scores and rankings are similar across 2020 and 2023. In 2020, the UK (5.4), Australia (5.0), and China (4.9) gave Wales its highest mean favourability scores, while Wales' lowest scores were from South Korea (4.0), Japan (4.2), and Turkey (4.2). Similarly, the UK (3rd), Australia (13th), Germany and Canada (both 17th) gave Wales its highest favourability rankings in 2020. India ranked Wales 44th for favourability in 2020, only once place higher than in 2023.

Figure 9: Favourability towards Wales by Familiarity with Wales (2023)



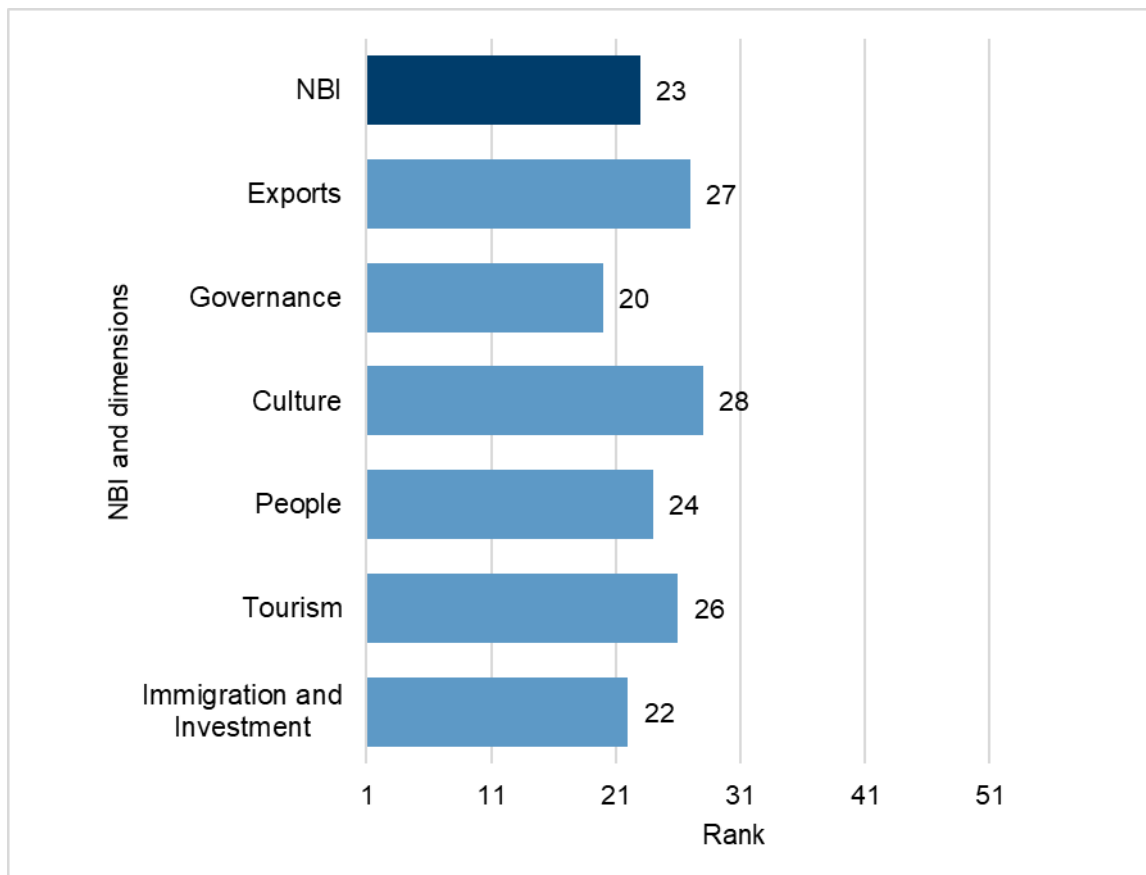
3.24 Figure 9 illustrates the relationship between favourability towards Wales and familiarity with Wales. Respondents who were more familiar with Wales were generally more favourable, with those who stated that they knew Wales “very well” giving a mean favourability score of 6.1, considerably above Wales' overall mean favourability score of 4.8.

NBI dimensions performance

Summary

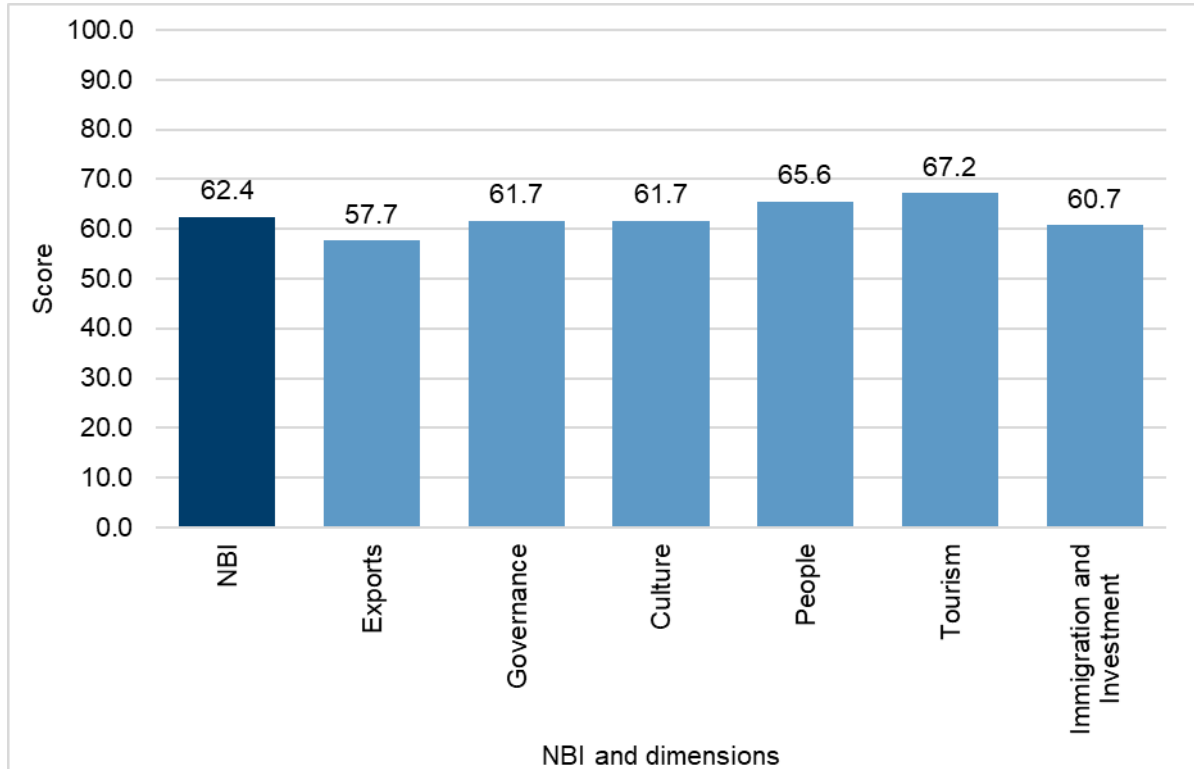
- 3.25 The NBI is made up of six dimensions, which are all equally weighted and used to calculate overall NBI rankings and scores. These six dimensions are: ‘Exports’; ‘Governance’; ‘Culture’; ‘People’; ‘Tourism’; and ‘Immigration and Investment’.
- 3.26 Wales’ rankings and scores across all six dimensions in 2023 are shown in Figures 10 and 11. An overview of the findings is provided in an infographic in Figure 14. Wales received consistent rankings across the dimensions, with rankings ranging from 20th to 28th place out of 60 nations. Wales ranked in the top half of the NBI nations across all dimensions, and in the top 25 for half of the dimensions.
- 3.27 Wales’ highest ranking was ‘Governance’, at 20th out of 60 countries, followed by ‘Immigration and Investment’ (22nd) and ‘People’ (24th). Wales received its lowest dimension ranking for ‘Culture’ at 28th [Figure 10].

Figure 10: Wales’ Overall NBI and Dimensions Rankings (2023)



3.28 Wales received its highest dimension score for 'Tourism' (67.2), followed by 'People' (65.6) and 'Governance' and 'Culture' (both 61.7). Wales' lowest dimension score was for 'Exports' (57.7) [Figure 11].

Figure 11: Wales' Overall NBI and Dimensions Scores (2023)



3.29 Figure 12 compares Wales' dimension rankings across 2020 and 2023. Wales received its highest rankings for the same dimensions across both years: 'Governance', 'Immigration and Investment', and 'People'. Likewise, 'Culture' was the lowest ranked dimension for Wales in 2020 and in 2023. Wales received slightly lower rankings across all dimensions in 2023, compared to 2020, except for 'Culture', which was ranked one place higher in 2023.

Figure 12: Wales' Overall NBI and Dimensions Rankings (2020 and 2023)

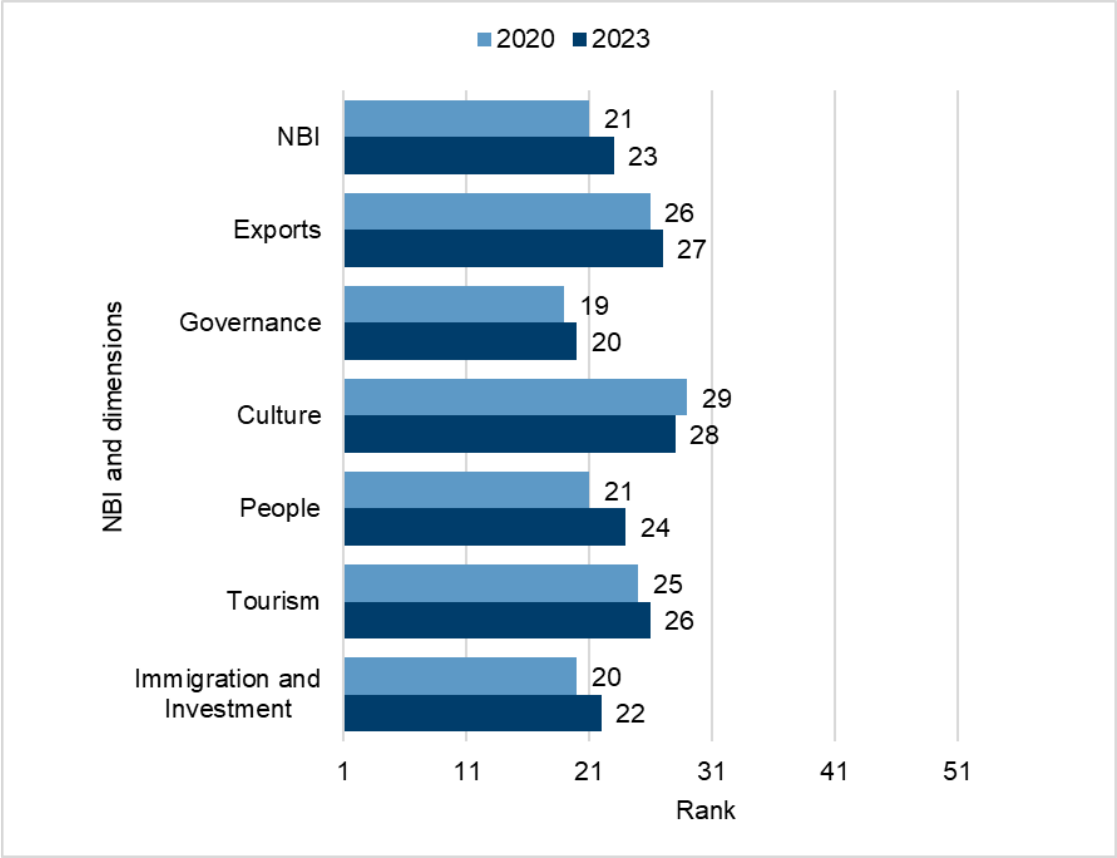
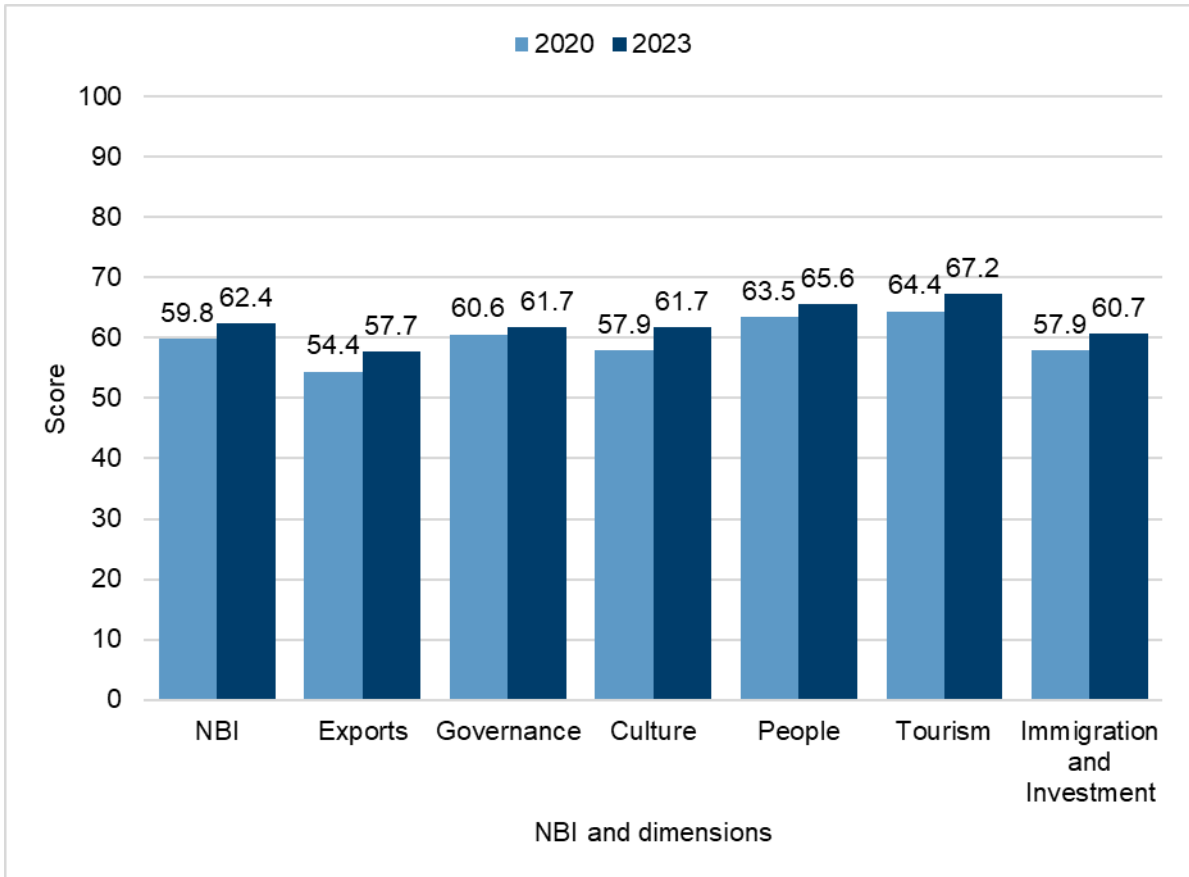


Figure 13: Wales' Overall NBI and Dimensions Scores (2020 and 2023)



3.30 Figure 13 compares Wales' dimension scores across 2020 and 2023. Wales received its highest scores for 'People', 'Tourism' and 'Governance', both in 2020 and in 2023. Similarly, Wales received its lowest score for 'Exports' in both years. In contrast to rankings, 2023 saw higher scores for Wales across all dimensions. However, it should be noted that on average, dimension scores increased across NBI nations from 2022 to 2023.¹⁶

¹⁶ [The Anholt-Ipsos Nation Brands IndexSM Press Release Supplemental Report, November 2023](#), page 13. Please note that these are changes in average scores from 2022 to 2023, rather than from 2020 to 2023.

Figure 14: Measuring Wales' Global Reputation, 2023

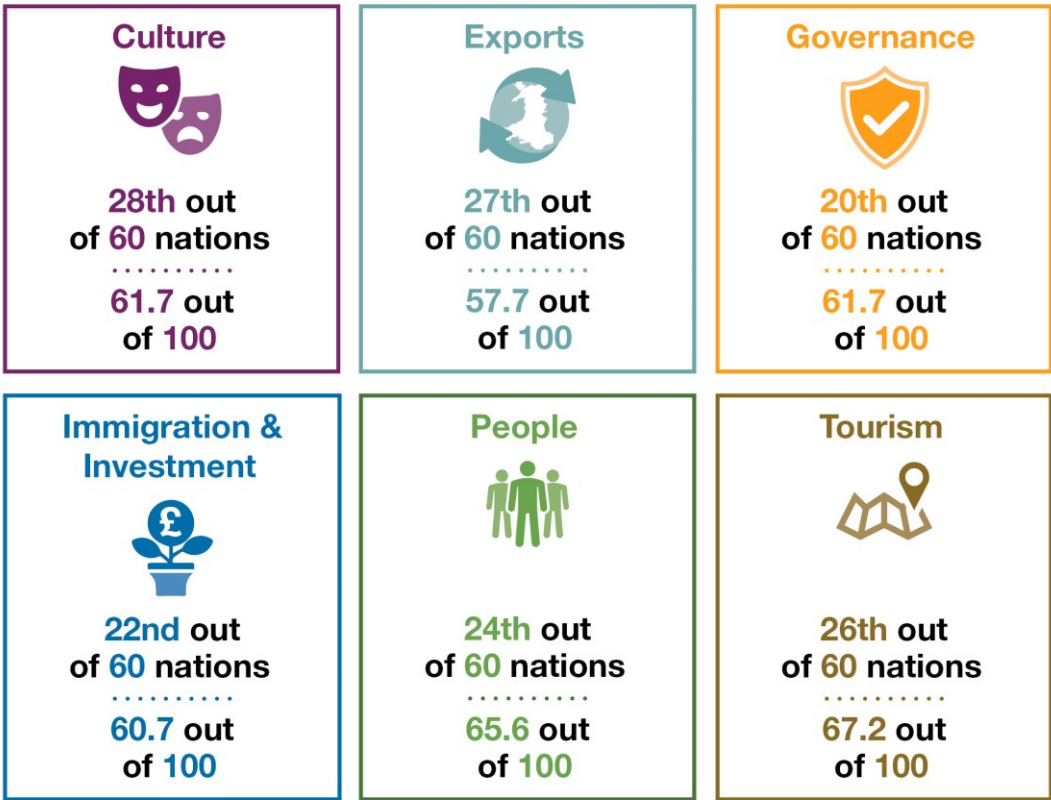
Measuring Wales' Global Reputation: 2023



The Anholt-Ipsos Nation Brands IndexSM (NBI) is an annual global nation brand survey. The 2023 NBI measured perceptions of 60 nations by conducting online interviews with 60,000 adults across 20 core panel countries.

The NBI scores and ranks the broad international reputation of 60 participating nations across six dimensions of national competence: Culture; Exports; Governance; Immigration and Investment; People; and Tourism. The overall NBI score is an average of the scores from these dimensions.

The 2023 data provides a snapshot of how Wales is seen globally. The rank is an indicator based on Wales's score on the NBI, and informs us of Wales's reputation relative to the other nations measured. While the score is not responsive to changes in the sample of measured nations, it can be used to track a country's reputation over time.



Exports

- 3.31 The ‘Exports’ dimension examined respondents’ perceptions of products and services from each measured NBI nation. The score for the ‘Exports’ dimension is out of 100, calculated using the scores from three questions which covered the following attributes:¹⁷
1. views of a nation’s “contribution to innovation in science and technology”;
 2. whether respondents feel better/worse about “buying products” knowing they are from a measured nation (also known as the “country of origin effect”); and
 3. the extent to which a nation is recognised as a “creative place with cutting-edge ideas and new ways of thinking”.
- 3.32 ‘Exports’ was the dimension for which Wales received its lowest score and second-lowest ranking; its score of 57.7 converting to a ranking position of 27th place out of 60 countries.

Table 8: Wales’ Exports Rank (2020 and 2023)

Dimension	2020	2023	Change
Exports	26	27	-1
Attributes			
Contribution to innovation in science and technology	27	32	-5
Buying products	22	24	-2
Creative place with cutting-edge ideas and new ways of thinking	26	26	0

- 3.33 Table 8 displays Wales’ rankings for ‘Exports’ in 2020 and 2023. In 2023, Wales’ ‘Exports’ ranking is in the top half of the NBI nations, at 27th of 60 nations. Wales’ highest ranking ‘Exports’ attribute was “buying products from the country” (24th), whereas Wales received its lowest attribute ranking for “contribution to innovation in science and technology” (32nd).

¹⁷ For each attribute, survey participants were presented with a statement and asked the extent to which they agreed or disagreed on a seven point Likert scale, with 1.0 being the lowest and worst and 7.0 the highest and best (and 4.0 being the middle neutral position).

3.34 Wales received its second-lowest dimension ranking for ‘Exports’, both in 2020 and in 2023. Compared to 2020, Wales’ ‘Exports’ ranking is one place lower in 2023. Rankings for ‘Exports’ attributes in 2023 are either lower than or in line with rankings in 2020. In line with 2023, Wales received its highest ‘Exports’ attributes ranking in 2020 for “buying products from the country”, and its lowest for “contribution to innovation in science and technology”.

Table 9: Wales’ Exports Scores (2020 and 2023)

Dimension	2020	2023	Change
Exports	54.4	57.7	+3.3
Attributes			
Contribution to innovation in science and technology	51.8	55.0	+3.2
Buying products	56.0	59.4	+3.4
Creative place with cutting-edge ideas and new ways of thinking	55.1	58.6	+3.5

3.35 Table 9 compares Wales’ scores for ‘Exports’ in 2020 and 2023. In both 2020 and 2023, Wales received its lowest dimension score for ‘Exports’. Wales received its highest ‘Exports’ attribute score for “buying products from the country”, and its lowest for “contribution to innovation in science and technology”, reflecting rankings for these attributes.

3.36 Wales’ ‘Exports’ score is 3.3 points higher in 2023, compared to 2020. Similarly, ‘Exports’ attributes scores for Wales are between 3.2 and 3.5 points higher in 2023, compared to 2020. In both 2020 and 2023, Wales received its highest ‘Exports’ attribute score for “buying products from the country”, and its lowest for “contribution to innovation in science and technology”.

3.37 Wales received its highest ‘Exports’ rankings from the UK (18th), Sweden (21st), Australia (22nd) and France (24th). Wales received its lowest rankings from India (46th), Russia (43rd) and South Africa (39th). The profile of nations that gave Wales its highest and lowest ‘Exports’ rankings is similar across 2020 and 2023.

Governance

3.38 The ‘Governance’ dimension aimed to explore perceptions of a nation’s government, and was assessed based on scores from five attribute statements which explored respondent’s views around whether a nation:

1. “is competently and honestly governed”;
2. “respects the rights of all its citizens and treats them with fairness”;
3. “behaves responsibly in the areas of international peace and security”;
4. “behaves responsibly to protect the environment”; and
5. “behaves responsibly to help reduce world poverty”.

3.39 ‘Governance’ was Wales’ highest ranked dimension in 2023, ranking 20th out of 60 NBI nations. Wales’ ‘Governance’ score was 61.7, making it the third highest-scored dimension for Wales.¹⁸

Table 10: Wales’ Governance Rank (2020 and 2023)

Dimension	2020	2023	Change
Governance	19	20	-1
Attributes			
Governed competently and honestly	17	19	-2
Respects the rights of its citizens and treats them with fairness	19	19	0
International peace and security	19	21	-2
Protects the environment	18	20	-2
Helps reduce world poverty	18	20	-2

3.40 Table 10 displays Wales’ rankings for ‘Governance’ in 2020 and 2023. In 2023, Wales’ ‘Governance’ ranking is in the top half of the NBI nations, at 20th of 60 nations. Wales’ two highest ranking attributes for the ‘Governance’ dimension are “governed competently and honestly” and “respects the rights of its citizens and treats them with fairness” (both ranked 19th). Although Wales received its lowest attribute ranking for “behaves responsibly in the areas of international peace and

¹⁸ In 2023, Wales received scores of 61.7 for both ‘Governance’ and ‘Culture’, producing a tie for the third highest dimension score for Wales.

security”, Wales’ ranking for this attribute was still within the top half of the NBI nations (21st out of 60).

3.41 ‘Governance’ was Wales’ highest ranked dimension in both 2020 and 2023. Wales’ ‘Governance’ ranking is one place lower in 2023, compared to 2020. Rankings for ‘Governance’ attributes in 2023 are either lower than or in line with rankings in 2020. Similar to attributes rankings in 2023, Wales received its highest ‘Governance’ attributes ranking in 2020 for “governed competently and honestly”. Its lowest-ranked attributes for the ‘Governance’ dimension in 2020 were “behaves responsibly in the areas of international peace and security” and “respects the rights of its citizens and treats them with fairness” (both 19th). While the former attribute was also the lowest-ranked ‘Governance’ attribute for Wales in 2023, the latter was one of the highest-ranked in 2023. However, it is unlikely that this reflects a change in perceptions of Wales between 2020 and 2023, as Wales received the same ranking (19th) for “respects the rights of its citizens and treats them with fairness” in 2020 and 2023.

Table 11: Wales’ Governance Scores (2020 and 2023)

Dimension	2020	2023	Change
Governance	60.6	61.7	+1.1
Attributes			
Governed competently and honestly	60.7	61.6	+0.9
Respects the rights of its citizens and treats them with fairness	63.9	64.2	+0.3
International peace and security	62.4	63.2	+0.8
Protects the environment	59.9	65.0	+5.1
Helps reduce world poverty	56.1	60.9	+4.8

3.42 Table 11 compares Wales’ scores for ‘Governance’ in 2020 and 2023. In both 2020 and 2023, Wales received its third highest dimension score for ‘Governance’. Wales received its highest ‘Governance’ attribute score for “behaves responsibly to protect the environment”, and its lowest for “behaves responsibly to end world poverty”, in contrast with attribute rankings.

- 3.43 Wales' 'Governance' score is 1.1 point higher in 2023, compared to 2020. Similarly, 'Governance' attributes scores for Wales are between 0.3 and 5.1 points higher in 2023, compared to 2020. The largest increase in an attribute score for Wales was for the attribute "behaves responsibly to protect the environment", the top scoring attribute for Wales in 2023. In 2020, Wales received its highest attribute score for "respects the rights of its citizens and treats them with fairness", and its lowest attribute score for "behaves to reduce world poverty". Wales received its lowest score for the latter in both 2020 and 2023.
- 3.44 In 2023, Wales received its highest 'Governance' rankings from the UK (5th), Australia (12th) and Germany (15th). Wales received its lowest rankings from Russia (45th), India (42nd) and Saudi Arabia (31st). The profile of nations that gave Wales its highest and lowest 'Governance' rankings is similar across 2020 and 2023.

Culture

- 3.45 The 'Culture' dimension examined respondents' perceptions of a nation's cultural reputation, by asking three questions which explored views around whether a nation:
1. "excels at sport";
 2. "has a rich cultural heritage"; and
 3. "is an interesting and exciting place for contemporary culture such as music, films, art and literature".
- 3.46 'Culture' was Wales' lowest ranking dimension in 2023, with a ranking of 28th out of 60 NBI nations. However, Wales received a dimension score of 61.7, making it the third highest scored dimension for Wales, tied with 'Governance'.

Table 12: Wales' Culture Rank (2020 and 2023)

Dimension	2020	2023	Change
Culture	29	28	+1
Attributes			
Excels at sport	27	29	-2
Rich cultural heritage	24	24	0
Contemporary culture	26	27	-1

- 3.47 Table 12 displays Wales’ rankings for ‘Culture’ in 2020 and 2023. In 2023, Wales’ ranking for ‘Culture’ is just within the top half of the NBI nations, at 28th out of 60 nations. Wales’ highest ranking attribute under the ‘Culture’ dimension is “has a rich cultural heritage” (24th). Wales’ lowest ranking attribute is “excels at sport” (29th).
- 3.48 Wales received its lowest dimension ranking for ‘Culture’, both in 2020 and in 2023. However, Wales’ ranking for ‘Culture’ was one place higher in 2023, compared to 2020, making ‘Culture’ the only dimension for which Wales received a higher ranking in 2023 than in 2020. In contrast, Wales’ rankings for ‘Culture’ attributes in 2023 were either slightly lower or in line with rankings for 2020. “Rich cultural heritage” was the attribute for which Wales received its highest ranking (24th), whereas “excels at sport” was Wales’ lowest ranked attribute (27th).

Table 13: Wales’ Culture Scores (2020 and 2023)

Dimension	2020	2023	Change
Culture	57.9	61.7	+3.8
Attributes			
Excels at sport	53.3	57.9	+4.6
Rich cultural heritage	63.4	66.2	+2.8
Contemporary culture	56.8	60.9	+4.1

- 3.49 Table 13 compares Wales’ scores for ‘Culture’ in 2020 and 2023. In 2020, Wales received its fourth highest dimension score for ‘Culture’, whereas in 2023, ‘Culture’ was Wales’ third highest scored dimension.¹⁹ Wales received its highest ‘Culture’ attribute score for “has a rich cultural heritage”, and its lowest for “excels at sport”, in line with attribute rankings.
- 3.50 Wales’ ‘Culture’ score is 3.8 points higher in 2023, compared to 2020. Similarly, ‘Culture’ attributes scores for Wales are between 2.8 and 4.6 points higher in 2023, compared to 2020. The largest increase in an attribute score for Wales was for the lowest-scoring attribute, “excels at sport”. In both 2020 and 2023, “has a rich cultural heritage” and “excels at sport” were the highest and lowest scoring attributes for Wales respectively.

¹⁹ In 2020, Wales received scores of 57.9 for both ‘Culture’ and ‘Immigration and Investment’, producing a tie between both dimensions for Wales’ fourth highest dimension score. Similarly, in 2023, Wales’ scores for ‘Culture’ and ‘Governance’ were tied at 61.7.

3.51 In 2023, Wales received its highest ‘Culture’ rankings from the UK (13th), France (14th), and Australia (19th). Wales received its lowest rankings from Mexico, India (both 45th), and Turkey (39th). The profile of nations that gave Wales its highest and lowest rankings for ‘Culture’ is similar across 2020 and 2023.

People

3.52 The ‘People’ dimension explored respondents’ perceptions of a nation’s people, by asking three questions which explored:

1. a nation’s friendliness, by asking respondents whether they thought that “the people would make [them] feel very welcome” if they were to visit the country;
2. whether respondents would “like to have a person from this country as a close friend”; and
3. how willing respondents would be to consider hiring a well-qualified person from the country to fill an important position in their organisation.²⁰

3.53 Wales received its third highest dimension ranking for ‘People’, with a ranking of 24th out of 60 NBI nations. Wales also received its second-highest dimension score for ‘People’, scoring 65.6.

Table 14: Wales’ People Rank (2020 and 2023)

Dimension	2020	2023	Change
People	21	24	-3
Attributes			
Would feel welcome when visiting the country	21	22	-1
Would like a person from the country as a close friend	22	24	-2
Willingness to hire well-qualified people from the country	20	24	-4

3.54 Table 14 displays Wales’ rankings for ‘People’ in 2020 and 2023. In 2023, Wales’ rank for ‘People’ was within the top half of the NBI nations, at 24th out of 60. Wales

²⁰ This question asked respondents to first “Imagine that [they] are a manager needing to fill an important position in [their] organisation”.

received its highest attribute ranking for “would feel welcome when visiting the country” (22nd), while receiving lower rankings for the attributes “would like a person from the country as a close friend” and “willingness to hire well-qualified people from the country” (both 24th).

- 3.55 ‘People’ was Wales’ third highest ranked dimension, both in 2020 and in 2023. However, Wales was ranked three places lower for ‘People’ in 2023, compared to 2020. Similarly, rankings for ‘People’ attributes for Wales were lower in 2023, compared to 2020. In 2020, Wales received its highest attribute ranking for “willingness to hire well-qualified people from the country” (20th), whereas in 2023, this was one of the lowest ranked attributes for Wales (24th). This attribute also saw the largest drop in rankings between 2020 and 2023. Wales’ lowest ranked attribute in 2020 was “would like a person from the country as a close friend” (22nd), which was also one of the lowest ranked attributes for Wales in 2023 (24th).

Table 15: Wales’ People Scores (2020 and 2023)

Dimension	2020	2023	Change
People	63.5	65.6	+2.1
Attributes			
Would feel welcome when visiting the country	62.6	64.4	+1.8
Would like a person from the country as a close friend	62.1	64.4	+2.3
Willingness to hire well-qualified people from the country	66.2	68.0	+1.8

- 3.56 Table 15 compares Wales’ scores for ‘People’ in 2020 and 2023. In both 2020 and 2023, Wales received its second highest dimension score for ‘People’. Wales received its highest ‘People’ attribute score for “willingness to hire well-qualified people from the country”, while receiving lower scores for “would feel welcome when visiting the country” and “would like a person from the country as a close friend”, similar to attribute rankings.
- 3.57 Wales’ ‘People’ score is 2.1 points higher in 2023, compared to 2020. Similarly, ‘People’ attribute scores for Wales are between 1.8 and 2.3 points higher in 2023, compared to 2020. The largest increase in an attribute score for Wales was for one

of the two lower scoring attributes, “would like a person from the country as a close friend”. Similar to 2023, in 2020 Wales received a higher attribute score for “willingness to hire well-qualified people from the country”, compared to the two lower scores received for “would feel comfortable when visiting the country” and “would like a person from the country as a close friend”.

3.58 In 2023, Wales received its highest rankings for ‘People’ from the UK (9th), Australia (15th), Germany and the USA (both 19th). Wales’ lowest rankings were from Russia (49th), India (44th) and Saudi Arabia (39th). The profile of nations that gave Wales its highest and lowest rankings for ‘People’ is similar across 2020 and 2023.

Tourism

3.59 The ‘Tourism’ dimension explored respondents’ perceptions of a nation’s tourism appeal, by asking four questions which explored views around whether a nation:

1. is somewhere that respondents would like to visit “if money was no object”;
2. “is rich in natural beauty”;
3. “is rich in historic buildings and monuments”; and
4. “has a vibrant city life and urban attractions”.

3.60 ‘Tourism’ was Wales’ fourth highest ranked dimension, with a ranking of 26th out of 60 NBI nations. However, Wales’ highest dimension score was for ‘Tourism’, with a score of 67.2.

Table 16: Wales’ Tourism Rank (2020 and 2023)

Dimension	2020	2023	Change
Tourism	25	26	-1
Attributes			
Would visit if money were no object	21	23	-2
Rich in natural beauty	23	28	-5
Rich in historic buildings and monuments	23	23	0
Vibrant urban life and attractions	31	30	+1

3.61 Table 16 displays Wales’ rankings for ‘Tourism’ in 2020 and 2023. In 2023, Wales’ rank for ‘Tourism’ was within the top half of the NBI nations, at 26th out of 60. Wales

received its highest attribute rankings for “would like to visit if money were no object” and “rich in historic buildings and monuments” (both 23rd). Wales’ lowest ranked attribute was “vibrant urban life and attractions” (30th).

3.62 ‘Tourism’ was Wales’ fourth highest ranked dimension, in both 2020 and 2023. Wales’ dimension ranking for ‘Tourism’ was one place lower in 2020, compared to 2023. Wales received lower rankings for the attributes “would like to visit if money were no object” and “rich in natural beauty” in 2023, compared to 2020. “Rich in historic buildings and monuments” received the same ranking in 2020 and 2023 (23rd), while “vibrant urban life and attractions” was ranked one place higher in 2023 than in 2020. However, “vibrant urban life and attractions” remained Wales’ lowest ranked attribute, both in 2020 (31st) and in 2023 (30th). “Would like to visit if money were no object” was the highest ranked attribute for Wales in 2020, similar to 2023. Notably, Wales’ ranking for “rich in natural beauty” was five places lower in 2023 (28th), compared to 2020 (23rd).

Table 17: Wales’ Tourism Scores (2020 and 2023)

Dimension	2020	2023	Change
Tourism	64.4	67.2	+2.8
Attributes			
Would visit if money were no object	65.4	67.8	+2.4
Rich in natural beauty	68.0	69.6	+1.6
Rich in historic buildings and monuments	63.5	67.3	+3.8
Vibrant urban life and attractions	60.7	64.2	+3.5

3.63 Table 17 compares Wales’ scores for ‘Tourism’ in 2020 and 2023. In both 2020 and 2023, Wales received its highest dimension score for ‘Tourism’. Wales received its highest ‘Tourism’ attribute score for “rich in natural beauty”, and its lowest for “vibrant urban life and attractions”. Wales also received its lowest attribute ranking for the latter.

3.64 Wales’ ‘Tourism’ score is 2.8 points higher in 2023, compared to 2020. Similarly, ‘Tourism’ attribute scores for Wales are between 1.6 and 3.8 points higher in 2023, compared to 2020. The largest increase in an attribute score for Wales was for “rich in historic buildings and monuments”. In both 2020 and 2023, Wales received its

highest attribute score for “rich in natural beauty”, and its lowest attribute score for “vibrant urban life and attractions”.

3.65 In 2023, Wales received its highest rankings for ‘Tourism’ from the UK (9th), Australia (20th), France and Canada (both 21st). Wales received its lowest rankings from Russia (47th), Saudi Arabia (43rd) and India (41st). The profile of nations that gave Wales its highest and lowest rankings for ‘Tourism’ is similar across 2020 and 2023.

Immigration and Investment

3.66 The ‘Immigration and Investment’ dimension explored perceptions of a nation’s economic prosperity, equality of opportunity, and whether the nation is a place with a high quality of life, by asking five questions which covered:

1. respondents’ “willingness to live and work for a substantial period” in the nation;
2. whether respondents consider the nation as a “place with a high quality of life”;
3. whether respondents feel the nation is a “good place to study for educational qualifications”;
4. whether respondents feel the nation has “businesses [they would] like to invest in”; and
5. whether respondents feel the nation “cares about equality in society”.

3.67 Wales’ second-highest dimension ranking was for ‘Immigration and Investment’, with a ranking of 22nd out of 60 NBI nations. However, with a score of 60.7, Wales also received its second-lowest dimension score for ‘Immigration and Investment’.

Table 18: Wales' Immigration and Investment Rank (2020 and 2023)

Dimension	2020	2023	Change
Immigration and Investment	20	22	-2
Attributes			
Would like to live and work	20	22	-2
Quality of life	20	22	-2
Good place to study for educational qualifications	20	20	0
Has businesses to invest in	23	26	-3
Cares about equality in society	19	20	-1

- 3.68 Table 18 displays Wales' rankings for 'Immigration and Investment' in 2020 and 2023. In 2023, Wales' rank for 'Immigration and Investment' was within the top half of the NBI nations, at 22nd out of 60. Wales received its highest attribute rankings for "is a good place to study for educational qualifications" and "cares about equality in society" (both 20th). Wales' lowest ranked attribute was "has businesses to invest in" (26th).
- 3.69 'Immigration and Investment' was Wales' second highest ranked dimension, in both 2020 and 2023. Wales' dimension ranking for 'Immigration and Investment' was two places lower in 2020, compared to 2023. In 2023, Wales' attribute rankings were either lower than or in line with attributes rankings in 2020. "Cares about equality in society" was Wales' highest ranked attribute in 2020 (19th), similar to 2023 (20th). Additionally, "has businesses to invest in" was Wales' lowest ranked attribute in both 2020 (23rd) and 2023 (26th).

Table 19: Wales' Immigration and Investment Scores (2020 and 2023)

Dimension	2020	2023	Change
Immigration and Investment	57.9	60.7	+2.8
Attributes			
Would like to live and work	53.8	59.4	+5.6
Quality of life	63.2	65.2	+2.0
Good place to study for educational qualifications	59.4	62.4	+3.0
Has businesses to invest in	52.0	54.8	+2.8
Cares about equality in society	60.4	62.1	+1.7

- 3.70 Table 19 compares Wales' scores for 'Immigration and Investment' in 2020 and 2023. In both 2020 and 2023, Wales received its second-lowest dimension score for 'Immigration and Investment'.²¹ Wales received its highest 'Immigration and Investment' attribute score for "quality of life", and its lowest for "has businesses to invest in". Wales also received its lowest attribute ranking for the latter.
- 3.71 Wales' 'Immigration and Investment' score is 2.8 points higher in 2023, compared to 2020. Similarly, 'Immigration and Investment' attribute scores for Wales are between 1.7 and 5.6 points higher in 2023, compared to 2020. The largest increase in an attribute score for Wales was for "would like to live and work". In both 2020 and 2023, Wales received its highest attribute score for "quality of life", and its lowest attribute score for "has businesses to invest in".
- 3.72 In 2023, Wales received its highest rankings for 'Immigration and Investment' from the UK (11th), Australia (15th), Sweden and the US (both 19th). Wales received its lowest rankings from Saudi Arabia (35th), India and Russia (34th). The profile of nations that gave Wales its highest and lowest rankings for 'Immigration and Investment' is similar across 2020 and 2023.

Wales' Attribute Rankings and Scores

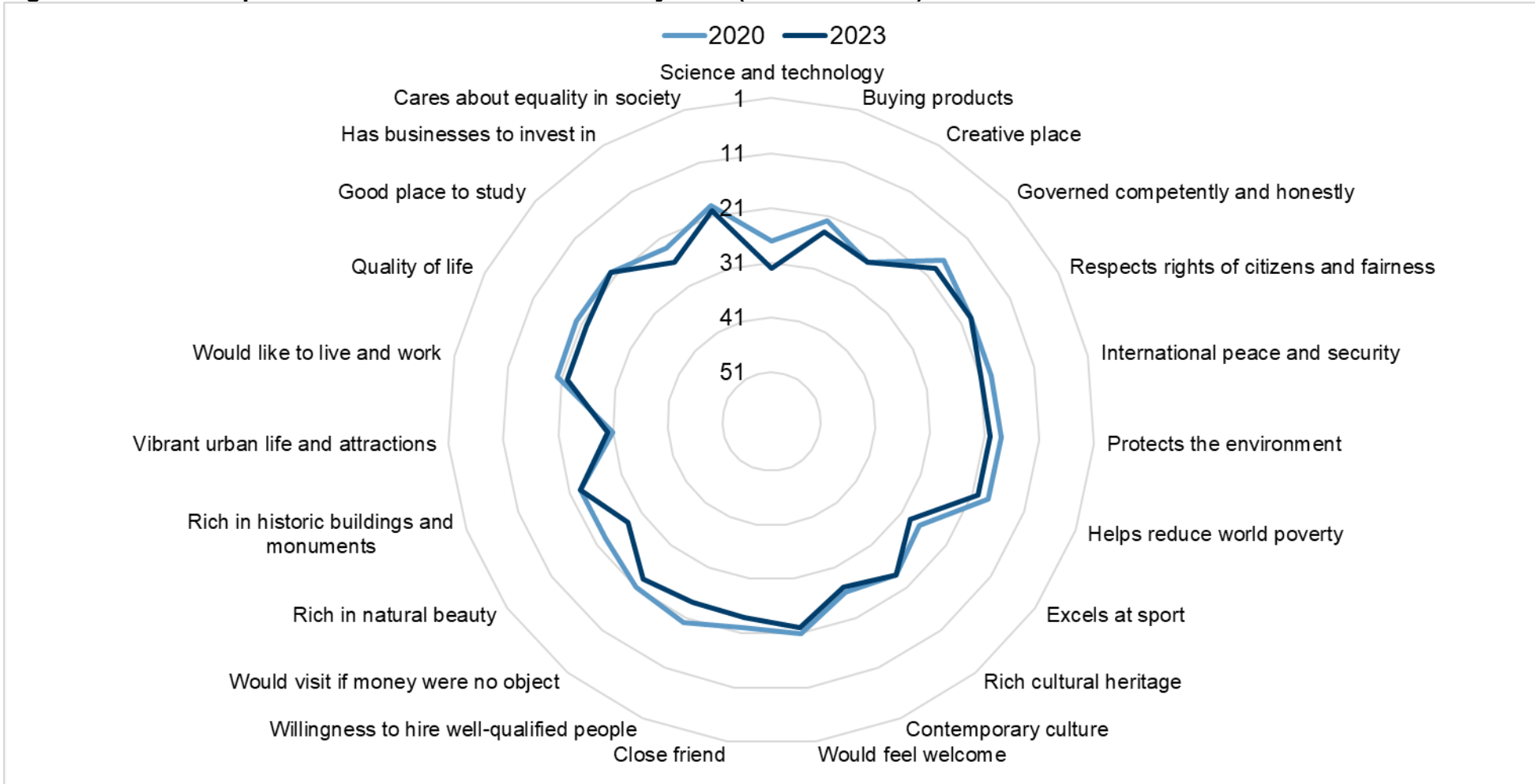
- 3.73 Wales' rankings for the NBI attributes in 2020 and 2023 are visually summarised at Figure 15, using the concept of the NBI hexagon. In the hexagon, the centre of the circle represents the lowest position rank of 60th and the outer circle represents the top ranking position of 1st place.
- 3.74 Figure 15 shows Wales' rankings for the 23 attributes comprising the NBI Hexagon Indices and provides an overview of the findings for the key reputational aspects measured by the NBI in 2020 and 2023. In 2023, Wales ranked in the top 20 for 6 out of the 23 attributes. Its highest rankings were for the 'Governance' statements: Wales is "competently and honestly governed" (19th), "respects the rights of its citizens and treats them with fairness" (19th), "behaves responsibly to protect the environment" (20th), and "behaves responsibly to reduce world poverty" (20th). In addition, Wales also received high rankings for two Immigration and Investment

²¹ In 2020, Wales received scores of 57.9 for both 'Culture' and 'Immigration and Investment', tying both dimensions for the second lowest dimension scores for Wales.

statements: Wales is “good place to study for educational qualifications” (20th), and “cares about equality in society” (20th).

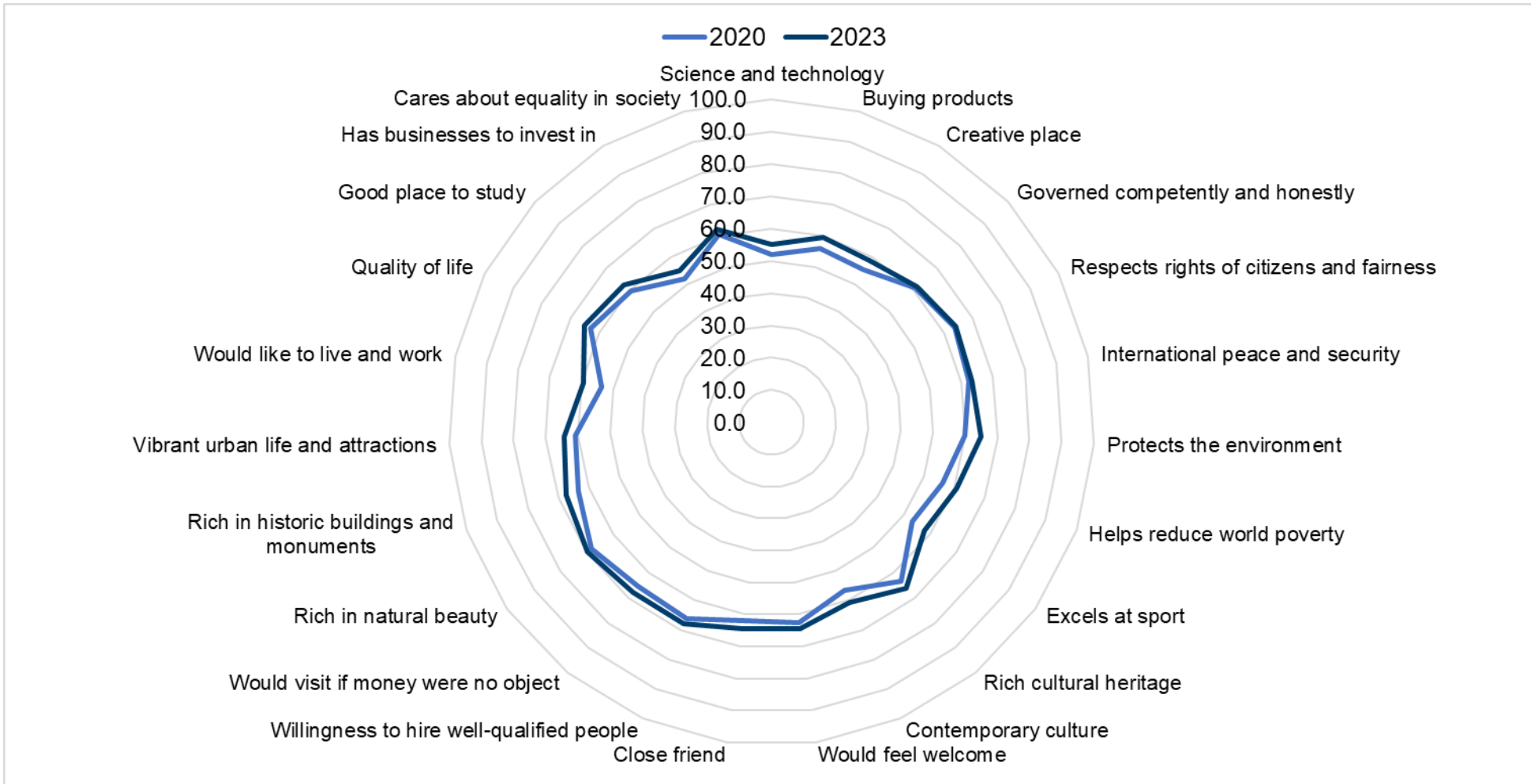
- 3.75 In contrast, respondents’ perceptions of Wales were weakest around its “contribution to innovation in science and technology” (32nd), its having “a vibrant city life and urban attractions” (30th), and its “excelling at sport” (29th), from the ‘Exports’, ‘Tourism’ and ‘Culture’ dimensions respectively [Figure 15].
- 3.76 The profile of the highest and lowest ranking attributes for Wales is very similar across 2020 and 2023. In 2023, Wales received lower rankings than in 2020 for most attributes. The greatest drops in rankings were for “contribution to innovation in science and technology” and “rich in natural beauty”, both of which were ranked 5 places lower in 2023, compared to 2020. Although Wales received one of its lowest attribute rankings in 2023 for “has a vibrant city life and urban attractions”, this is the only attribute that Wales received a higher ranking for in 2023 (30th), compared to 2020 (31st) [Figure 15].

Figure 15: Wales' reputation across the 23 attributes by rank (2020 and 2023)



- 3.77 Figure 16 summarises Wales' scores for the 23 attributes in 2020 and 2023. In the hexagon, the centre of the circle represents the lowest score of 0.0 and the outer circle represents the top score of 100.0.
- 3.78 In 2023, Wales' highest scores were for "rich in natural beauty" (69.6), "willingness to hire well-qualified people from this country" (68.0), and "would like to visit if money was no object" (67.8), from the 'People' and 'Tourism' dimensions. Conversely, Wales received its lowest scores for "has businesses to invest in" (54.8), "contribution to innovation in science and technology" (55.0), and "excels at sport" (57.9), from the 'Immigration and Investment', 'Exports' and 'Culture' dimensions respectively [Figure 16].
- 3.79 The profile of highest and lowest attribute scores for Wales is very similar across 2020 and 2023. Wales received higher scores for all attributes in 2023, compared to 2020. The greatest score increase was for "would like to live and work in the country for a substantial period", which received a score 5.6 points higher in 2023 (59.4), compared to 2020 (53.8) [Figure 16].

Figure 16: Wales' reputation across the 23 attributes by score (2020 and 2023)



Common Interest Questions

Sustainability

3.80 Respondents were presented with four statements on the theme of sustainability, and asked the extent to which they agreed that countries were:

1. “taking action to combat climate change”;
2. “working hard towards affordable and clean energy”;
3. “focused on protecting wildlife and restoring habitats”;
4. “encouraging responsible industries that do not damage the environment”.

Table 20: Wales Sustainability Scores and Rank (2023)

Attribute	Mean Score	Index Score	Rank
Combat climate change	4.5	59.2	20
Working hard towards affordable and clean energy	4.5	58.8	21
Protecting wildlife and restoring habitats	4.5	59.4	20
Encourages responsible industries	4.6	59.9	20

3.81 Table 20 summarises Wales’ scores and rankings across the four sustainability statements. Wales received mean scores between 4.5 and 4.6 (slightly above the neutral mid-point of the scale), which translated into index scores between 58.8 and 59.9, and rankings between 20th and 21st place out of 60 nations. Wales received its highest score for “encouraging responsible industries that do not damage the environment” (59.9).

Food and Water

3.82 Two statements regarding food and water were presented to respondents, who were asked the extent to which they agreed that:

1. “This country is focused on access to clean water and nutrition for all”;
2. “This country’s food is good”.

Table 21: Wales' Food and Water Scores and Rank (2023)

Attribute	Mean Score	Index Score	Rank
Access to clean water and nutrition for all	4.7	61.6	22
Good food	4.6	60.7	33

3.83 Table 21 summarises Wales' scores and rankings for the two questions on the topic of food and water. For both statements, Wales received mean scores that were slightly above the scale's neutral mid-point, and similar index scores just above 60. However, Wales was ranked considerably higher for being "focused on access to clean water and nutrition for all" (22nd) than for having "good food" (33rd).

Other questions

3.84 Five other statements were presented to respondents, who were asked to what extent they agreed that:

1. "This country is honest about its past";
2. "I would feel safe in this country";
3. "This place is unlike anywhere else";
4. "I trust the products that are made in this country";
5. "I think of this country as a global economic leader".

Table 22: Wales' Other Common Interest Questions Scores and Rank

Attribute	Mean Score	Index Score	Rank
Honest about its past	4.6	60.6	20
Would feel safe in this country	5.0	67.5	19
Unlike anywhere else	4.9	64.5	40
Trust products made in this country	4.7	62.4	24
Think of country as a global economic leader	4.2	53.1	33

3.85 Table 22 summarises Wales' scores and rankings across five common interest questions. Wales received mean scores above the neutral mid-point for all three statements and received its highest mean (5.0) and index scores (67.5) for the

statement “I would feel safe in this country”, along with its highest ranking across the three questions (19th). Wales also received a high rank for the statement “this country is honest about its past” (20th). However, respondents gave Wales a much lower ranking for the statement “this place is unlike anywhere else in the world” (40th).

Wales’ Perceptions of Wales

- 3.86 As well as subscribing to include Wales as one of the 60 participating nations on the general NBI, Wales was included as an additional core panel country. The NBI was fielded with 500 respondents from Wales who were asked the same questions as the core panel countries, to explore Wales’ perceptions of itself.
- 3.87 Respondents from Wales ranked Wales in 2nd position overall, behind the UK in 1st place, and in front of Switzerland, which was ranked 3rd.²² Wales ranked itself within the top 5 for each of the six dimensions, scoring itself highest (81.2), and ranking in 1st position overall, for ‘People’, and lowest for ‘Exports’, in 4th place (71.8) [Table 19].
- 3.88 Table 19 shows the scores and ranks for dimensions disaggregated by their underlying attributes. Wales ranked itself 1st for five of the 23 attributes. These five attributes were:
- ‘Exports’: feel better/worse about “buying products/services” knowing they are from Wales (77.6);
 - ‘People’: “would feel welcome when visiting the country” (81.0);
 - ‘People’: “would like a person from this country as close friend” (80.5);
 - ‘Tourism’: “would visit if money were no object” (84.7); and
 - ‘Immigration and Investment’: “would like to live and work in this country” (85.6).
- 3.89 Wales ranked itself lowest, in 13th place, for “governed competently and honestly” (‘Governance’) and second lowest, in 12th place, for its “quality of life” (‘Immigration and Investment’) [Table 23].

²² The overall top ten ranked countries by respondents from Wales were, in descending order, UK (1st), Wales (2nd), Switzerland (3rd), Scotland (4th), New Zealand (5th), Australia (10th), Japan (7th), Ireland (8th), the Netherlands (9th), and Germany (10th).

Table 23: How Wales scored itself by dimension and attribute, by rank and score (2023)

NBI	Rank	Score
Overall	2	76.3
Exports	4	71.8
Contribution to innovation in science and technology	7	68.5
Buying products	1	77.6
Creative place with cutting-edge ideas and new ways of thinking	7	69.3
Governance	3	72.6
Governed competently and honestly	13	68.3
Respects the rights of its citizens and treats them with fairness	4	75.9
International peace and security	2	77.7
Protects the environment	3	72.8
Helps reduce world poverty	3	68.3
Culture	3	74.5
Excels at sport	10	70.1
Rich cultural heritage	5	80.0
Contemporary culture	3	73.3
People	1	81.2
Would feel welcome when visiting the country	1	81.0
Would like a person from the country as a close friend	1	80.5
Willingness to hire well-qualified people from the country	4	82.2
Tourism	2	81.7
Would visit if money were no object	1	84.7
Rich in natural beauty	2	85.0
Rich in historic buildings and monuments	5	82.0
Vibrant urban life and attractions	10	75.3
Immigration and Investment	2	76.0
Would like to live and work	1	85.6
Quality of life	12	75.1
Good place to study for educational qualifications	2	76.9
Has businesses to invest in	2	66.7
Cares about equality in society	2	75.4

3.90 For favourability, Wales ranked itself in 1st place out of the 60 measured NBI nations, with a score of 6.2 (on a 1.0 to 7.0 point scale).

3.91 Wales' highest and lowest ranked dimensions and attributes, according to respondents from Wales, were very similar across 2020 and 2023. For most attributes, Wales had lower rankings but slightly higher scores in 2023, compared to 2020. Wales' rankings for the willingness of respondents to "live and work in the country for a substantial period of time" (under 'Immigration and Investment') and its "vibrant urban life and attractions" (under 'Tourism') increased by one place each in 2023, compared to 2020. Wales' score for "vibrant urban life and attractions" was also 7.0 points higher in 2023 compared 2020, its highest increase across all attribute scores. In contrast, Wales received its greatest declines in attribute rank and score for "governed competently and honestly" (under 'Governance'), which ranked was 11 places and 3.2 points lower in 2023, compared to 2020.

4. Conclusions

- 4.1 In 2023, Wales participated in the Anholt Ipsos NBI. The data provided a broad, generalisable set of findings on global awareness levels of and views on Wales, based on a snapshot of respondents' views across the dimensions and attributes measured.
- 4.2 Wales ranked in 23rd place overall out of 60 countries, in the upper half of the NBI, with an overall NBI score of 62.4. Countries which scored higher than Wales were, in the main, high income democracies, mostly in Western Europe. Wales' rank and score have remained largely stable since 2020, receiving rankings between 21st and 23rd place and scores between 59.8 and 62.5. While Wales has received lower rankings since 2020, this is likely to be partially attributable to the expansion of the NBI from 2021 onwards. Wales' score in 2023 was higher than in 2022 and 2020, and just below its highest score of 62.5 in 2021.
- 4.3 Wales achieved an above average favourability score, with a mean favourability score of 4.8 (on a 1.0 to 7.0 point scale). Respondents who were more familiar with Wales were, on average, more favourable towards Wales. Wales received its highest favourability rankings from English-speaking countries (specifically the UK, Australia and Canada). Wales received a slightly lower favourability ranking in 2023 compared to 2020 but saw a slight increase in its mean favourability score.
- 4.4 Across the six dimensions, respondents were asked to score 23 attributes (see Figure 3.13 for the NBI hexagon). Wales performed best in the 'Governance' dimension, where it ranked in 20th place, and achieved its best ranking attributes, "governed competently and honestly" and "respects the rights of its citizens and treats them with fairness" (both 19th). Wales' lowest ranked dimension was 'Culture', where its low score for the "excels at sports" attribute contributed to its ranking in 28th place. Wales' lowest ranking attribute across all dimensions was for its "contribution to innovation in science and technology" (32nd), under 'Exports'. Wales achieved its highest dimension score for 'Tourism' (67.2), and its highest scoring attribute for "rich in natural beauty" (69.6). Wales' lowest scored dimension was 'Exports', with its low score for its "contribution to innovation in science and technology" (55.0) contributing to its score of 57.7. Wales' lowest scoring attribute

across the dimensions was “has businesses to invest in” (54.8), under ‘Immigration and Investment’.

- 4.5 Compared to 2020, Wales received lower rankings across all dimensions in 2023, except for ‘Culture’, for which Wales’ ranking was one place higher. Similarly, Wales’ rankings across attributes were lower in 2023 compared to 2020, with the exception of “has a vibrant urban life and attractions” under ‘Tourism’ (which was ranked one place higher than in 2020). The greatest decline in dimension rankings was for ‘People’, which received a ranking three places lower than in 2020. Across the attributes, the greatest declines for Wales were for its “contribution to innovation in science and technology” (under ‘Exports’) and its being “rich in natural beauty” (under ‘Tourism’), both of which were ranked five places lower than in 2020.
- 4.6 However, Wales received higher scores across all dimensions in 2023, compared to 2020. ‘Culture’ saw the greatest increase, with Wales receiving a dimension score 3.8 points higher than in 2020. Additionally, Wales received higher scores across all attributes in 2023. The willingness of respondents to “live and work in the country for a substantial period of time” (under ‘Immigration and Investment’) saw the greatest increase, with Wales receiving a score 5.6 points higher than in 2020.
- 4.7 To explore how Wales perceived itself, Wales was included as an additional panel country. Wales ranked itself in 2nd position overall, behind the UK, and in the top 5 for each of the dimensions. Wales’ rank in 2023 remained unchanged, whereas Wales’ score was 2.0 points higher, compared to 2020. Respondents in Wales ranked Wales similarly across dimensions in 2020 and 2023, with rankings in 2023 either lower or stable compared to 2020, while scores increased across all dimensions. An exception was Wales’ rank and score for “governed competently and honestly”, for which respondents in Wales gave a considerably higher ranking and score (2nd and 71.5) in 2020, compared to 2023 (13th and 68.3).

Reference section

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Annex A: Questionnaire Outline

The 2023 Nation Brands Index questionnaire for all survey countries included the following questions:

- Awareness of nations: know very well, know somewhat well, know just a little, have heard of but know almost nothing, never heard of
- Favourability toward nations: seven-point scale (7 = extremely favourable, 4 = neither favourable nor unfavourable, 1 = extremely favourable)
- Previously visited nations: visited for vacation, visited for business

Nation Brand hexagon questions

These are rating scale questions, using seven-point scales anchored by strongly agree and strongly disagree, and middle point anchored by neither agree nor disagree.

Exports

- makes major contribution to innovation in science and technology;
- feel better/worse about buying products from the country;
- is a creative place with cutting-edge ideas and new ways of thinking

Governance

- is competently and honestly governed;
- respects the rights of all its citizens and treats them with fairness;
- behaves responsibly in the areas of international peace and security;
- behaves responsibly to protect the environment;
- behaves responsibly to reduce world poverty

Culture

- excels at sport;
- has a rich cultural heritage;

- is an interesting and exciting place for contemporary culture such as music, films, art and literature

People

- would make me feel very welcome if I visited;
- would like to have a person from country as a close friend;
- willingness to hire well-qualified people from country

Tourism

- strongly like/not like to visit if money was no object;
- rich in natural beauty;
- rich in historic buildings and monuments;
- has a vibrant city life and urban attractions

Immigration and investment

- willingness to live and work for a substantial period;
- place with a high quality of life;
- good place to study for educational qualifications;
- has businesses I'd like to invest in;
- country cares about equality in society

Common interest questions

- Experiences with nations: purchased products or services from country, visited websites or social media sites from or about country
- Likelihood of visiting in the next five years: four-point scale (4 = very likely, 3 = somewhat likely, 2 = not very likely, 1 = not at all likely)

Questions below are rating scale questions, using seven-point scales anchored by strongly agree and strongly disagree, and middle point anchored by neither agree nor disagree.

- trust the products that are made in country

- think of the country as a global economic leader
 - country is taking action to combat climate change
 - country is working hard towards affordable and clean energy
 - country is focused on protecting wildlife and restoring habitats
 - country is focused on access to clean water and nutrition for all
 - country's food is good
 - country is honest about its past
 - would feel safe in this country
 - country is unlike anywhere else
 - country encourages more responsible industries that do not damage the environment
-
- Personality traits that best describe each nation (top three): trustworthy, friendly, happy, creative, strong, fun, generous, greedy, dull, arrogant, deceitful, weak, dangerous, troubled, attractive, competent, sophisticated

Demographic questions

- Age
- Gender
- Education
- Type of area lived in
- Employment status
- Profession
- Household income
- Race/ethnicity (where applicable)
- Region (where applicable)

Annex B: Wales' Dimension and Attribute Mean and Converted Scores by Relationship and Familiarity with Wales

This Annex contains tables of Wales' Likert scale mean and converted scores for each of the six dimensions and their underlying attributes, as well as common interest questions on sustainability, food and water, broken down by relationship and familiarity with Wales.

Table B.1: Wales' Exports Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Exports: major contribution to innovation in science and technology	Mean Score	Converted Score
Total	4.3	55.0
Relationship with Wales		
Have visited Wales for a holiday	4.9	64.5
Have not visited Wales for a holiday	4.2	53.5
Have visited a Welsh website	4.8	63.0
Have not visited a Welsh website	4.2	53.0
Familiarity with Wales		
Never heard of Wales	3.7	44.7
Heard of Wales, but know almost nothing	3.8	47.9
Know Wales just a little	4.2	53.6
Know Wales somewhat well	4.8	63.7
Know Wales very well	5.5	75.1
Exports: buying products	Mean Score	Converted Score
Total	4.5	59.4
Relationship with Wales		
Have visited Wales for a holiday	5.2	70.0
Have not visited Wales for a holiday	4.4	57.6
Have visited a Welsh website	5.1	68.3
Have not visited a Welsh website	4.4	57.1
Familiarity with Wales		
Never heard of Wales	3.7	46.2
Heard of Wales, but know almost nothing	4.1	52.5
Know Wales just a little	4.5	58.6
Know Wales somewhat well	5.1	68.7
Know Wales very well	5.7	78.4
Creative place with cutting-edge ideas and new ways of thinking	Mean Score	Converted Score

Total	4.5	58.6
Relationship with Wales		
Have visited Wales for a holiday	5.0	67.5
Have not visited Wales for a holiday	4.4	57.1
Have visited a Welsh website	5.0	67.5
Have not visited a Welsh website	4.4	56.3
Familiarity with Wales		
Never heard of Wales	3.8	46.4
Heard of Wales, but know almost nothing	4.1	52.2
Know Wales just a little	4.4	57.8
Know Wales somewhat well	5.0	67.5
Know Wales very well	5.6	76.4

Table B.2: Wales' Governance Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Governance: governed competently and honestly	Mean Score	Converted Score
Total	4.7	61.6
Relationship with Wales		
Have visited Wales for a holiday	5.2	70.8
Have not visited Wales for a holiday	4.6	60.1
Have visited a Welsh website	5.2	69.6
Have not visited a Welsh website	4.5	59.4
Familiarity with Wales		
Never heard of Wales	3.9	49.2
Heard of Wales, but know almost nothing	4.3	54.6
Know Wales just a little	4.7	61.7
Know Wales somewhat well	5.2	69.8
Know Wales very well	5.7	79.0
Governance: respects rights of citizens and treats them with fairness	Mean Score	Converted Score
Total	4.8	64.2
Relationship with Wales		
Have visited Wales for a holiday	5.5	74.8
Have not visited Wales for a holiday	4.7	62.4
Have visited a Welsh website	5.3	71.5
Have not visited a Welsh website	4.7	62.4

Familiarity with Wales		
Never heard of Wales	4.1	51.5
Heard of Wales, but know almost nothing	4.4	57.1
Know Wales just a little	4.9	65.0
Know Wales somewhat well	5.3	72.3
Know Wales very well	5.8	80.4
Governance: international peace and security	Mean Score	Converted Score
Total	4.8	63.2
Relationship with Wales		
Have visited Wales for a holiday	5.4	73.6
Have not visited Wales for a holiday	4.7	61.4
Have visited a Welsh website	5.2	70.0
Have not visited a Welsh website	4.7	61.4
Familiarity with Wales		
Never heard of Wales	4.0	50.7
Heard of Wales, but know almost nothing	4.4	56.3
Know Wales just a little	4.8	63.9
Know Wales somewhat well	5.3	71.3
Know Wales very well	5.7	78.9
Governance: protects the environment	Mean Score	Converted Score
Total	4.7	61.4
Relationship with Wales		
Have visited Wales for a holiday	5.2	70.1
Have not visited Wales for a holiday	4.6	59.9
Have visited a Welsh website	5.1	69.3
Have not visited a Welsh website	4.5	59.2
Familiarity with Wales		
Never heard of Wales	4.0	51.2
Heard of Wales, but know almost nothing	4.2	54.5
Know Wales just a little	4.6	60.6
Know Wales somewhat well	5.2	69.5
Know Wales very well	5.7	79.0
Governance: helps reduce world poverty	Mean Score	Converted Score
Total	4.5	58.1
Relationship with Wales		
Have visited Wales for a holiday	5.0	67.2
Have not visited Wales for a holiday	4.4	56.6
Have visited a Welsh website	5.0	66.3

Have not visited a Welsh website	4.3	55.9
Familiarity with Wales		
Never heard of Wales	3.9	49.3
Heard of Wales, but know almost nothing	4.1	51.3
Know Wales just a little	4.4	56.9
Know Wales somewhat well	4.9	66.0
Know Wales very well	5.5	75.7

Table B.3: Wales' Culture Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Culture: excels at sport	Mean Score	Converted Score
Total	4.5	57.9
Relationship with Wales		
Have visited Wales for a holiday	5.0	66.5
Have not visited Wales for a holiday	4.4	56.4
Have visited a Welsh website	5.0	66.2
Have not visited a Welsh website	4.3	55.8
Familiarity with Wales		
Never heard of Wales	3.9	49.2
Heard of Wales, but know almost nothing	4.1	51.5
Know Wales just a little	4.4	56.9
Know Wales somewhat well	4.9	65.5
Know Wales very well	5.5	75.3
Culture: rich cultural heritage	Mean Score	Converted Score
Total	5.0	66.2
Relationship with Wales		
Have visited Wales for a holiday	5.5	74.9
Have not visited Wales for a holiday	4.9	64.9
Have visited a Welsh website	5.4	73.4
Have not visited a Welsh website	4.8	64.4
Familiarity with Wales		
Never heard of Wales	4.2	53.0
Heard of Wales, but know almost nothing	4.6	60.4
Know Wales just a little	5.0	66.8
Know Wales somewhat well	5.4	73.8
Know Wales very well	5.8	80.7
Culture: contemporary culture	Mean Score	Converted Score

Total	4.6	60.9
Relationship with Wales		
Have visited Wales for a holiday	5.1	68.7
Have not visited Wales for a holiday	4.6	59.6
Have visited a Welsh website	5.1	69.0
Have not visited a Welsh website	4.5	58.8
Familiarity with Wales		
Never heard of Wales	4.1	52.6
Heard of Wales, but know almost nothing	4.3	54.6
Know Wales just a little	4.6	59.9
Know Wales somewhat well	5.0	67.7
Know Wales very well	5.7	77.7

Table B.4: Wales' People Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

People: would make me feel very welcome when visiting the country		
	Mean Score	Converted Score
Total	4.8	64.4
Relationship with Wales		
Have visited Wales for a holiday	5.4	74.1
Have not visited Wales for a holiday	4.7	62.7
Have visited a Welsh website	5.3	71.6
Have not visited a Welsh website	4.7	62.5
Familiarity with Wales		
Never heard of Wales	4.1	52.5
Heard of Wales, but know almost nothing	4.5	58.1
Know Wales just a little	4.9	64.5
Know Wales somewhat well	5.3	71.6
Know Wales very well	5.9	81.2
People: would like a person from the country as a close friend		
	Mean Score	Converted Score
Total	4.8	64.4
Relationship with Wales		
Have visited Wales for a holiday	5.3	72.3
Have not visited Wales for a holiday	4.8	63.0
Have visited a Welsh website	5.4	73.4

Have not visited a Welsh website	4.7	62.1
Familiarity with Wales		
Never heard of Wales	4.2	53.1
Heard of Wales, but know almost nothing	4.5	58.1
Know Wales just a little	4.8	64.2
Know Wales somewhat well	5.3	72.0
Know Wales very well	5.8	80.5
People: willingness to hire well-qualified people from the country		
	Mean Score	Converted Score
Total	5.1	68.0
Relationship with Wales		
Have visited Wales for a holiday	5.6	76.6
Have not visited Wales for a holiday	5.0	66.5
Have visited a Welsh website	5.5	75.3
Have not visited a Welsh website	4.9	66.0
Familiarity with Wales		
Never heard of Wales	4.2	54.5
Heard of Wales, but know almost nothing	4.7	62.1
Know Wales just a little	5.1	69.0
Know Wales somewhat well	5.5	74.8
Know Wales very well	5.9	82.2

Table B.5: Wales' Tourism Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Tourism: would visit if money were no object	Mean Score	Converted Score
Total	5.1	67.8
Relationship with Wales		
Have visited Wales for a holiday	5.7	78.1
Have not visited Wales for a holiday	4.9	66.0
Have visited a Welsh website	5.7	77.7
Have not visited a Welsh website	4.9	65.2
Familiarity with Wales		
Never heard of Wales	4.0	50.2
Heard of Wales, but know almost nothing	4.6	60.2
Know Wales just a little	5.2	70.3
Know Wales somewhat well	5.6	76.4

Know Wales very well	6.0	83.8
Tourism: rich in natural beauty	Mean Score	Converted Score
Total	5.2	69.6
Relationship with Wales		
Have visited Wales for a holiday	5.7	78.6
Have not visited Wales for a holiday	5.1	68.2
Have visited a Welsh website	5.6	76.2
Have not visited a Welsh website	5.1	67.8
Familiarity with Wales		
Never heard of Wales	4.3	55.6
Heard of Wales, but know almost nothing	4.8	63.7
Know Wales just a little	5.3	71.5
Know Wales somewhat well	5.6	76.4
Know Wales very well	5.9	82.2
Tourism: rich in historic buildings and monuments	Mean Score	Converted Score
Total	5.0	67.3
Relationship with Wales		
Have visited Wales for a holiday	5.5	75.1
Have not visited Wales for a holiday	4.9	66.0
Have visited a Welsh website	5.5	74.6
Have not visited a Welsh website	4.9	65.4
Familiarity with Wales		
Never heard of Wales	4.3	55.3
Heard of Wales, but know almost nothing	4.6	61.1
Know Wales just a little	5.1	68.2
Know Wales somewhat well	5.5	74.6
Know Wales very well	5.9	81.0
Tourism: vibrant urban life and attractions	Mean Score	Converted Score
Total	4.8	64.2
Relationship with Wales		
Have visited Wales for a holiday	5.3	71.5
Have not visited Wales for a holiday	4.8	63.0
Have visited a Welsh website	5.3	72.4
Have not visited a Welsh website	4.7	62.1
Familiarity with Wales		

Never heard of Wales	4.3	55.0
Heard of Wales, but know almost nothing	4.5	58.4
Know Wales just a little	4.8	63.7
Know Wales somewhat well	5.2	71.0
Know Wales very well	5.8	79.4

Table B.6: Wales' Immigration and Investment Attributes Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Immigration and Investment: willingness to live and work for a substantial period	Mean Score	Converted Score
Total	4.5	59.4
Relationship with Wales		
Have visited Wales for a holiday	5.2	71.0
Have not visited Wales for a holiday	4.4	57.4
Have visited a Welsh website	5.3	71.8
Have not visited a Welsh website	4.3	56.1
Familiarity with Wales		
Never heard of Wales	3.8	46.5
Heard of Wales, but know almost nothing	4.0	50.7
Know Wales just a little	4.6	59.6
Know Wales somewhat well	5.1	69.3
Know Wales very well	5.7	79.0
Immigration and Investment: place with a high quality of life	Mean Score	Converted Score
Total	4.9	65.2
Relationship with Wales		
Have visited Wales for a holiday	5.4	72.8
Have not visited Wales for a holiday	4.8	63.9
Have visited a Welsh website	5.4	73.3
Have not visited a Welsh website	4.8	63.0
Familiarity with Wales		
Never heard of Wales	4.2	53.0
Heard of Wales, but know almost nothing	4.5	59.1
Know Wales just a little	4.9	65.5
Know Wales somewhat well	5.4	72.8
Know Wales very well	5.8	79.4
Immigration and Investment: good place to study for educational qualifications	Mean Score	Converted Score

Total	4.7	62.4
Relationship with Wales		
Have visited Wales for a holiday	5.3	71.3
Have not visited Wales for a holiday	4.6	60.9
Have visited a Welsh website	5.3	72.0
Have not visited a Welsh website	4.6	59.9
Familiarity with Wales		
Never heard of Wales	4.0	51.0
Heard of Wales, but know almost nothing	4.3	55.9
Know Wales just a little	4.7	62.2
Know Wales somewhat well	5.2	70.6
Know Wales very well	5.7	78.2

Immigration and Investment: has businesses		
I'd like to invest in	Mean Score	Converted Score
Total	4.3	54.8
Relationship with Wales		
Have visited Wales for a holiday	4.8	63.7
Have not visited Wales for a holiday	4.2	53.3
Have visited a Welsh website	5.0	66.7
Have not visited a Welsh website	4.1	51.7
Familiarity with Wales		
Never heard of Wales	3.8	47.5
Heard of Wales, but know almost nothing	3.8	46.9
Know Wales just a little	4.2	53.0
Know Wales somewhat well	4.8	63.7
Know Wales very well	5.5	75.3

Immigration and Investment: cares about		
equality in society	Mean Score	Converted Score
Total	4.7	62.1
Relationship with Wales		
Have visited Wales for a holiday	5.2	70.8
Have not visited Wales for a holiday	4.6	60.6
Have visited a Welsh website	5.2	70.3
Have not visited a Welsh website	4.6	59.9
Familiarity with Wales		
Never heard of Wales	4.1	51.7
Heard of Wales, but know almost nothing	4.3	55.5
Know Wales just a little	4.7	61.2

Know Wales somewhat well	5.2	70.6
Know Wales very well	5.7	78.2

Table B.7: Wales' Sustainability Common Interest Questions Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Sustainability: taking action to combat climate change		
	Mean Score	Converted Score
Total	4.5	59.2
Relationship with Wales		
Have visited Wales for a holiday	5.1	68.8
Have not visited Wales for a holiday	4.4	57.6
Have visited a Welsh website	5.0	67.5
Have not visited a Welsh website	4.4	57.1
Familiarity with Wales		
Never heard of Wales	4.0	50.0
Heard of Wales, but know almost nothing	4.1	52.3
Know Wales just a little	4.5	58.1
Know Wales somewhat well	5.0	67.2
Know Wales very well	5.6	77.4
Sustainability: working hard towards affordable and clean energy		
	Mean Score	Converted Score
Total	4.5	58.8
Relationship with Wales		
Have visited Wales for a holiday	5.0	67.5
Have not visited Wales for a holiday	4.4	57.3
Have visited a Welsh website	5.0	67.3
Have not visited a Welsh website	4.4	56.6
Familiarity with Wales		
Never heard of Wales	4.0	50.8
Heard of Wales, but know almost nothing	4.1	51.8
Know Wales just a little	4.4	57.8
Know Wales somewhat well	5.0	66.3
Know Wales very well	5.6	76.9
Sustainability: focused on protecting wildlife and restoring habitats		
	Mean Score	Converted Score
Total	4.5	59.4
Relationship with Wales		
Have visited Wales for a holiday	5.1	68.7

Have not visited Wales for a holiday	4.4	57.8
Have visited a Welsh website	5.0	67.7
Have not visited a Welsh website	4.4	57.1
Familiarity with Wales		
Never heard of Wales	4.0	51.0
Heard of Wales, but know almost nothing	4.1	52.6
Know Wales just a little	4.5	58.1
Know Wales somewhat well	5.0	67.0
Know Wales very well	5.6	77.2
Sustainability: encourages more responsible industries that do not damage the environment		
	Mean Score	Converted Score
Total	4.6	59.9
Relationship with Wales		
Have visited Wales for a holiday	5.0	67.5
Have not visited Wales for a holiday	4.5	58.6
Have visited a Welsh website	5.1	68.7
Have not visited a Welsh website	4.4	57.6
Familiarity with Wales		
Never heard of Wales	4.1	52.2
Heard of Wales, but know almost nothing	4.2	53.5
Know Wales just a little	4.5	58.6
Know Wales somewhat well	5.0	67.3
Know Wales very well	5.6	76.7

Table B.8: Wales' Food and Water Common Interest Questions Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Food and water: focused on access to clean water and nutrition for all		
	Mean Score	Converted Score
Total	4.7	61.6
Relationship with Wales		
Have visited Wales for a holiday	5.2	70.8
Have not visited Wales for a holiday	4.6	60.1
Have visited a Welsh website	5.2	69.5
Have not visited a Welsh website	4.6	59.6
Familiarity with Wales		
Never heard of Wales	4.1	51.3
Heard of Wales, but know almost nothing	4.3	55.3

Know Wales just a little	4.7	61.2
Know Wales somewhat well	5.1	68.8
Know Wales very well	5.7	78.2
Food and water: good food	Mean Score	Converted Score
Total	4.6	60.7
Relationship with Wales		
Have visited Wales for a holiday	5.1	68.7
Have not visited Wales for a holiday	4.5	59.4
Have visited a Welsh website	5.1	68.2
Have not visited a Welsh website	4.5	58.8
Familiarity with Wales		
Never heard of Wales	4.1	51.7
Heard of Wales, but know almost nothing	4.3	54.6
Know Wales just a little	4.6	60.2
Know Wales somewhat well	5.0	67.2
Know Wales very well	5.6	77.6

Table B.9: Wales' Other Common Interest Questions Mean and Converted Score by Relationship and Familiarity with Wales (2023)

Other common interest: honest about its past	Mean Score	Converted Score
Total	4.6	60.6
Relationship with Wales		
Have visited Wales for a holiday	5.2	69.8
Have not visited Wales for a holiday	4.5	59.1
Have visited a Welsh website	5.0	67.7
Have not visited a Welsh website	4.5	58.8
Familiarity with Wales		
Never heard of Wales	4.1	52.2
Heard of Wales, but know almost nothing	4.2	54.1
Know Wales just a little	4.6	60.1
Know Wales somewhat well	5.1	68.2
Know Wales very well	5.6	76.1
Other common interest: would feel safe in this country	Mean Score	Converted Score
Total	5.0	67.5
Relationship with Wales		
Have visited Wales for a holiday	5.7	78.9
Have not visited Wales for a holiday	4.9	65.5

Have visited a Welsh website	5.5	74.8
Have not visited a Welsh website	4.9	65.5
Familiarity with Wales		
Never heard of Wales	4.1	51.5
Heard of Wales, but know almost nothing	4.6	60.2
Know Wales just a little	5.2	69.5
Know Wales somewhat well	5.5	75.6
Know Wales very well	6.0	83.2

Other common interest: unlike anywhere else	Mean Score	Converted Score
Total	4.9	64.5

Relationship with Wales		
Have visited Wales for a holiday	5.2	69.8
Have not visited Wales for a holiday	4.8	63.5
Have visited a Welsh website	5.3	71.8
Have not visited a Welsh website	4.7	62.5

Familiarity with Wales		
Never heard of Wales	4.3	56.1
Heard of Wales, but know almost nothing	4.6	59.6
Know Wales just a little	4.8	63.9
Know Wales somewhat well	5.2	70.3
Know Wales very well	5.7	77.9

Other common interest: trust products made in this country	Mean Score	Converted Score
Total	4.7	62.4

Relationship with Wales		
Have visited Wales for a holiday	5.4	73.4
Have not visited Wales for a holiday	4.6	60.6
Have visited a Welsh website	5.2	70.8
Have not visited a Welsh website	4.6	60.2

Familiarity with Wales		
Never heard of Wales	3.7	46.0
Heard of Wales, but know almost nothing	4.3	55.1
Know Wales just a little	4.8	62.9
Know Wales somewhat well	5.3	72.0
Know Wales very well	5.8	80.9

Other common interest: think of as a global economic leader	Mean Score	Converted Score
Total	4.2	53.1

Relationship with Wales

Have visited Wales for a holiday	4.7	61.6
Have not visited Wales for a holiday	4.1	51.7
Have visited a Welsh website	4.8	62.9
Have not visited a Welsh website	4.0	50.5

Familiarity with Wales

Never heard of Wales	3.6	44.1
Heard of Wales, but know almost nothing	3.7	46.2
Know Wales just a little	4.1	51.7
Know Wales somewhat well	4.7	61.4
Know Wales very well	5.3	71.6
