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The Anholt Nation Brands Index: 2024 Report for Wales

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The Anholt Nation Brands Index: 2024 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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Table of contents

List of tables.....	2
List of figures.....	3
1. Introduction and background.....	4
2. Methodology.....	5
Core panel countries.....	5
Selection and weighting.....	6
Fieldwork Quality Control.....	6
General Panel Maintenance and Panel Quality Control.....	7
NBI Nations.....	7
NBI data and calculations	8
Data considerations	11
3. Findings.....	13
Overall Ranking	13
Favourability	16
Familiarity	18
NBI dimensions performance.....	20
4. Conclusions	25

List of tables

Table 1: 2024 Nation Brands Index, 20 core panel countries by region	6
Table 2: 2024 Nation Brand Index, 50 ranked nations	7
Table 3: 2024 Nation Brands Index, dimension outline	9
Table 4: conversion from 7-point Likert scale to score out of 100	11
Table 5: 2024 Nation Brands Index, Wales's overall rankings and scores over time	14
Table 6: 2020 to 2024 Nation Brands Index, Wales's favourability score and rank over time	17
Table 7: 2020 to 2024 Nation Brands Index, Wales's familiarity score and rank over time ..	19
Table 8: 2024 Nation Brands Index, dimension scores for Wales by country	24
Table 9: 2024 Nation Brands Index, dimension ranks for Wales by country	25

List of figures

Figure 1: 2023 to 2024 Nation Brands Index, Wales's overall NBI rank by core panel country	15
Figure 2: 2023 to 2024 Nation Brands Index, Wales's overall NBI score by core panel country	16
Figure 3: 2023 to 2024 Nation Brands Index, Wales's favourability score across 20 core panel countries	17
Figure 4: 2023 to 2024 Nation Brands Index, Wales's favourability ranking across 20 core panel countries	18
Figure 5: 2023 to 2024 Nation Brands Index, familiarity with Wales by panel country	19
Figure 6: 2024 Nation Brands Index, Wales's overall NBI and dimension scores	20
Figure 7: 2020 to 2024 Nation Brands Index, Wales's overall NBI and dimension scores	21
Figure 8: 2024 Nation Brands Index, Wales's overall NBI and dimension rankings	22
Figure 9: 2020 to 2024 Nation Brands Index, Wales's overall NBI and dimension rankings	23

1. Introduction and background

The Anholt Nation Brands Index® (hereafter referred to as NBI) is an annual online global panel survey which examines the image of 50 nations. This report outlines the findings from the Welsh Government's subscription to the 2024 NBI to measure Wales's reputation internationally and domestically.

The NBI started annually in 2005 and aims to measure the images of the world's nations, and to track their profiles as they rise or fall. 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 NBI is central to understanding of the Welsh Government's [International Strategy](#) (WG 2020) which describes Wales 'as a small country with big ambitions'. The Strategy sets out three core goals and its international vision to help position Wales for the challenges of the future; namely, to: raise Wales's profile on the international stage; grow the economy by increasing exports and attracting inward investment; and establish Wales as a globally responsible nation. The NBI serves as a powerful tool for enhancing Wales international strategy by providing insight in to how Wales is perceived globally and support in identifying opportunities to strengthen Wales as an international brand.

In 2024, the NBI was conducted in 19 high and middle-income countries that play important and diverse roles in international relations, trade and the flow of business, cultural and tourism activities. The survey aims to provide broad regional representation as well as balance between high-income and middle-income countries.

The findings for Wales presented in this report reflect the views and opinions of the online population in these 19 core panel countries. It aims to assess a country's overall image and reputation across six dimensions of national competence. The six dimensions are: 'Exports', 'Governance', 'Culture', 'People', 'Tourism' and 'Immigration and Investment'.

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 rankings and scores for Wales may deliver different messages about Wales's reputation. Read together, the rankings 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

The NBI data provide a snapshot of people's attitudes towards and perceptions of Wales. Attitudinal data like this can strengthen understandings of how Wales is viewed internationally helping build better understanding of Wales's reputation, both globally and internally.

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

2. Methodology

This section provides an overview of the methodological approach and quality control procedures adopted by Anholt & Co. for the 2024 NBI survey. For the purpose of continuity with previous NBI waves, Anholt & Co commissioned Ipsos Observer to conduct the fieldwork on a one-off basis in 2024.

Core panel countries

In 2024 approximately 42,000 respondents from 19 core panel countries participated in the survey. The 19 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. Fieldwork was conducted from 1st August to 10th September 2024 for all 19 core panel countries. The 19 core panel countries in 2024 are listed below and were the same as in previous years of the NBI. Due to international sanctions, it was not possible for interviews to be conducted within the Russian Federation, and so data from 3,004 interviews with the Russian panel in 2023 has been used in the NBI 2024.

Table 1: 2024 Nation Brands Index, 20 core panel countries by region

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

Source: Anholt Nation Brands Index®, 2024

Selection and weighting

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 2024 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. Ipsos' in-house sampling and statistics department calculated weights for each country. To ensure that 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.

Large, pre-recruited and regularly updated online panels were used for the 2024 NBI survey. Quality control procedures, such as frequent respondent identity verification, were practiced. 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.

Fieldwork Quality Control

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

The NBI survey is conducted online. For the 2024 NBI as in all other years, 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.

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.

NBI Nations

The 2024 NBI measured the image of 50 nations. In 2024, the number of countries ranked decreased from 60 to 50. The nations removed for 2024 included Botswana, Colombia, Dominican Republic, Ecuador, Hungary, Jordan, Morocco, Panama, Philippines, Qatar, Tanzania, and Vietnam. Estonia and Palestine were added in 2024. These 50 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.

Table 2: 2024 Nation Brand Index, 50 ranked nations

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, Poland, Romania, Russia Estonia, Slovakia, Turkey, Ukraine
Asia-Pacific	Australia, China, India, Indonesia, Japan, New Zealand, Singapore, South Korea, Taiwan
Latin America	Argentina, Brazil, Chile, Mexico, Peru
Middle East / Africa	Egypt, Israel, Kenya, Saudi Arabia, South Africa, Palestine, United Arab Emirates

Source: Anholt Nation Brands Index®, 2024

In each panel country the list of 50 nations was randomly assigned to respondents. These respondents rated 10 nations each. This ensured 25 priority nations (which included current NBI subscribers) received approximately 500 ratings per panel country and the remaining 25 nations received approximately 300 ratings per panel country.

NBI data and calculations

Data are presented in two formats in this report:

- Rank: 50 nations were included in the 2024 NBI. Where a rank is noted for Wales, this refers to the nation's position between 1 and 50, where 1 is the highest rank, placing 1st amongst all 50 nations measured.
- Score: The NBI score is presented as an average out of 100 of the six dimension scores.

Overall NBI

The overall NBI ranking and score measures the 50 NBI nations' overall image and reputation. The overall NBI ranking and score is worked out as an average of the six dimensions assessed in the survey that are outlined below: 'Exports', 'Governance', 'Culture', 'People', 'Tourism' and 'Immigration and Investment'.

Familiarity and favourability

At the start of the survey, respondents were asked to rate how well they felt they knew the 50 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"). 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 50 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.

Dimensions and attributes

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'.

Each individual dimension is calculated using the average from a set of attributes. For example, 'Exports' figures are an average of the responses to the three questions relating to 'exports'. At the dimension level, each dimension is an average of the attribute statement/question scores converted into a scale from 1 to 100. A description of each of the six dimensions and their underlying attributes or question areas is in table 3.

There were between three and five attributes used to calculate the scores for each dimension (see table 3). 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 to convert attribute scores into an overall dimension score. The conversion scores are outlined in table 4.

Table 3: 2024 Nation Brands Index, dimension outline

Dimension	Attributes Measured
Exports	<p>1) Respondents view of a nation's contribution to innovation in science and technology</p> <p>2) Whether respondents feel better/worse about buying products/services knowing they are from each nation</p> <p>3) Whether respondents think each nation is a creative place with cutting-edge ideas and new ways of thinking</p>
Governance	<p>1) Whether respondents think each nation is competently and honestly governed</p> <p>2) Whether respondents think each nation respects the rights of its citizens and treats them with fairness</p> <p>3) Whether respondents think each nation behaves responsibly in international peace and security</p> <p>4) Whether respondents think each nation behaves responsibly to protect the environment</p>

	5) Whether respondents think each nation behaves responsibly to help reduce world poverty
Culture	<p>1) Whether respondents feel each nation excels at sports</p> <p>2) Whether respondents feel each nation has a rich cultural heritage</p> <p>3) Whether respondents consider each nation as an interesting/exciting place for contemporary culture such as music, films, art and literature</p>
People	<p>1) Whether respondents felt that people from each nation would make them feel very welcome</p> <p>2) Whether respondents would like a person from each nation as a close friend</p> <p>3) Respondents' willingness to hire well-qualified people from each nation</p>
Tourism	<p>1) Whether respondents would like to visit a nation if money was no object</p> <p>2) Whether respondents feel each nation is rich in natural beauty</p> <p>3) Whether respondents think each nation is rich in historic buildings and monuments</p> <p>4) Whether respondents think each nation has a vibrant city life and urban attractions</p>
Immigration and Investment	<p>1) Respondents' willingness to live and work for a substantial period in each nation</p> <p>2) Whether respondents consider each nation as a place with a high quality of life</p>

	<p>3) Whether respondents feel each nation is a good place to study for educational qualifications</p> <p>4) Whether respondents feel each nation has businesses they would like to invest in</p> <p>5) Whether respondents feel each nation cares about equality in society</p>
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Table 4: conversion from 7-point Likert scale to score out of 100

7-point Likert Scale	Converted score, 1 to 100
1	1
2	17.5
3	34
4	50.5
5	67
6	83.5
7	100

The data presented within this report highlights key findings from 2024 in relation to:

- overall NBI
- familiarity and favourability
- dimensions

More detailed results relating to the attributes can be found in the associated tables but will not be presented within this written report.

Data considerations

Survey changes over time

Between 2021 and 2023 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. In 2024 the NBI reverted to 50 nations, with approximately 42,000 adults being surveyed. When comparing rankings across time, the expansion and then shrinking of the

NBI over this period should be kept in mind, as changes in rank could be at least partially attributable to this expansion.

It is also important to note that in 2024 all data from the Russian panel in this year's NBI is 2023 data, as international sanctions prevented the ability to conduct surveys within the Russian Federation.

An additional point to note is that for Wales subscription packages have changed over time resulting in varying levels of analysis and data available. In 2020 and 2023 the Welsh Government purchased a full subscription to NBI. In 2024 Wales purchased a retrospective report meaning that data is obtained later, compared to those who purchased a full subscription. The quality assurance process also differs between the subscriptions. The data received from Anholt & Co for the retrospective subscription is less granular than that of a full subscription. Therefore, the processing, quality assurance and analysis of the data has already been completed by the contractors and not by Welsh Government, as it is with the full subscription.

Wider considerations

There are also wider considerations which have a bearing on the analysis and reporting of the 2024 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. 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.
- 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 it is not possible to discern when this exposure happened from the NBI.
- A high score for a country does not necessarily indicate a high ranking for that country, and vice versa. 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.
- Dimension findings are presented as a score out of 1 to 100, calculated as an average of the scores given for the underlying questions.
- When analysing changes in the timeseries, a smaller score and rank changes can often be statistically insignificant. It is important to note that any increase or decrease mentioned in this report has not been significance tested.

3. Findings

Overall Ranking

In 2024, Wales ranked 23rd overall out of 50 countries, placing it in the top half of the NBI. Wales's overall NBI score was 62.0 out of 100. Wales's overall score is slightly higher than the mid-point of the highest and lowest scores.

Below are Wales's overall NBI rankings from 2020 to 2024. Rankings have remained largely stable, with a slight decrease from 21st place in 2020 to 22nd place in 2021 and 2022 and 23rd place between 2023 and 2024. Wales scores have also remained relatively stable over time.

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's reputation. Therefore, it is important to consider scores and ranks together, in order to understand the overall findings.

It should also be noted that in 2020 50 nations participated in NBI. From 2021 onwards, 60 nations have participated each year and in 2024 it returned to 50 nations. Also, as noted

previously reputational change takes a long time. Changes in ranking should be considered in this context.

Table 5: 2024 Nation Brands Index, Wales's overall rankings and scores over time

Measure	2020	2021	2022	2023	2024
Rank	21	22	22	23	23
Score	59.8	62.5	61.9	62.4	62.0

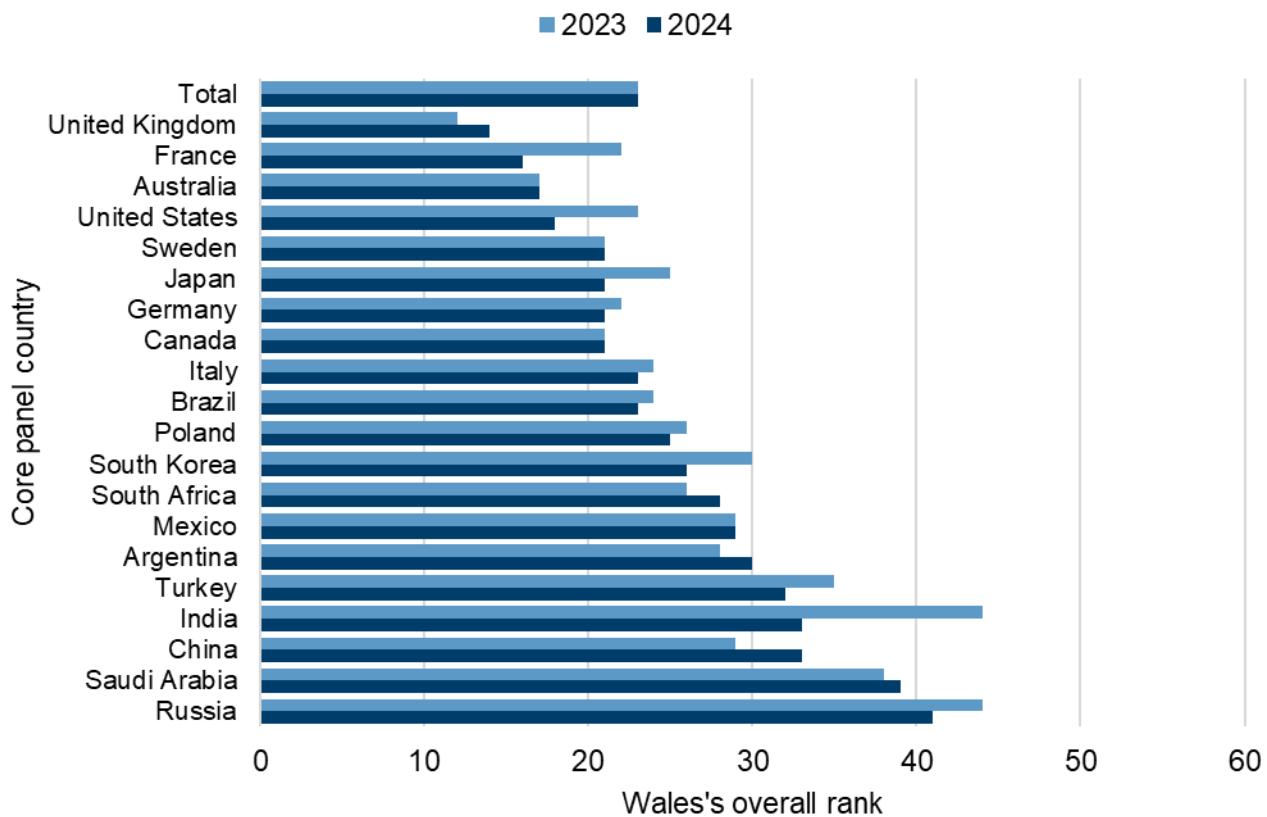
Source: Anholt Nation Brands Index®, 2020 to 2024

Wales's Reputation in the Core Panel Countries

Figure 1 shows the overall NBI rankings received for Wales by each of the core panel countries. On average, the regions where Wales's reputation was strongest were Western Europe and North America.

The highest rankings for Wales came from the UK (14th), France (16th), Australia (17th) and United States (18th). There were some quite distinct differences in rankings between 2023 and 2024. The biggest increases were seen for India who ranked Wales 44th in 2023 and 33rd in 2024, France (22nd in 2023 and 16th in 2024). The biggest declines in rankings between 2023 and 2024 were seen for China (29th in 2023 to 33rd in 2024). These differences should be interpreted with caution as they in part may be in part due to the changes in the number of nations involved dropping from 60 to 50 nations between 2023 and 2024.

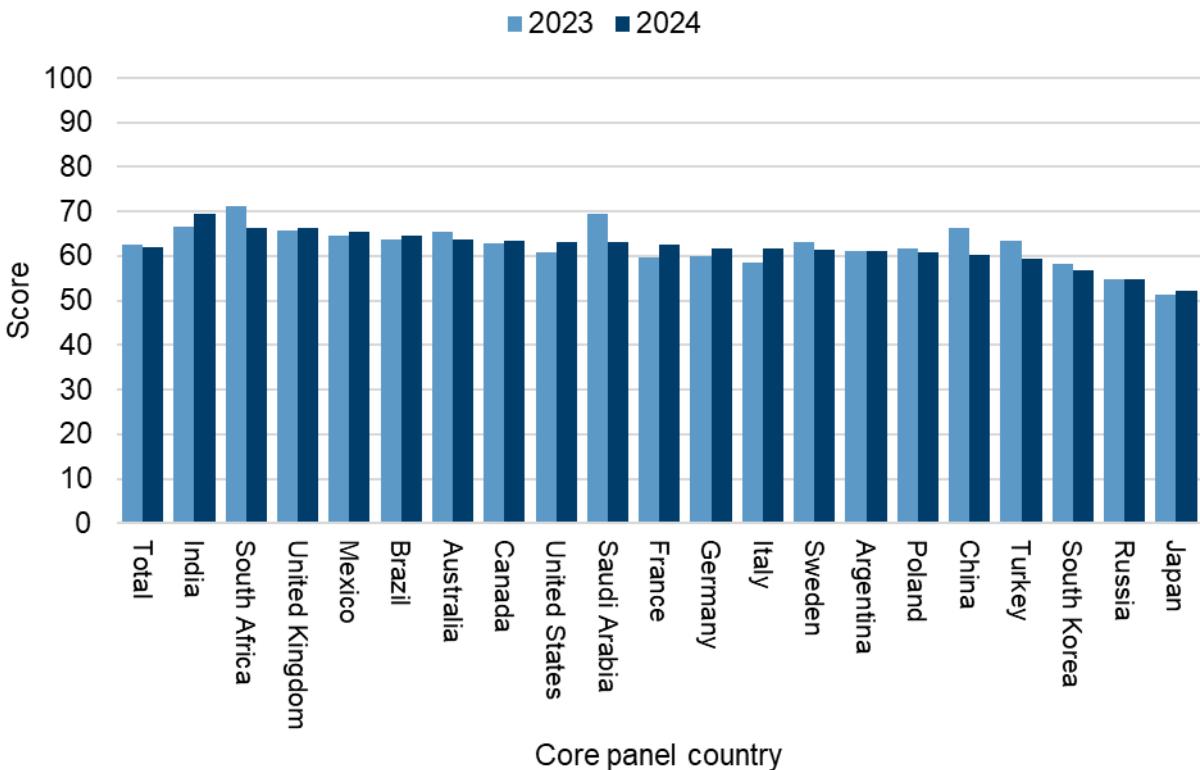
Figure 1: 2023 to 2024 Nation Brands Index, Wales's overall NBI rank by core panel country



Source: Anholt Nation Brands Index®, 2023 and 2024

Figure 2 shows the overall NBI scores received for Wales by each of the core panel countries. Scores have remained relatively stable between 2023 and 2024. In 2024 core panel countries with the highest scores for Wales were from India (69.4), South Africa (66.4) and United Kingdom (66.4). A notable difference between 2023 and 2024 can be seen in scores from Saudi Arabia. In 2023 Wales received one of the highest scores from Saudi Arabia (69.6) however in 2024 this declined to 63.1. Declines in scores for Wales can also be seen from China (66.3 in 2023 to 60.3 in 2024) and South Africa (71.2 in 2023 to 66.4 in 2024). The biggest increases in Wales's scores between 2023 and 2024 were seen from Italy (58.5 in 2023 to 61.7 in 2024), India (66.5 in 2023 to 69.4 in 2024) and France (59.7 in 2023 to 62.4 in 2024).

Figure 2: 2023 to 2024 Nation Brands Index, Wales's overall NBI score by core panel country



Source: Anholt Nation Brands Index®, 2023 and 2024

Favourability

The NBI 2024 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.

The mean favourability score for Wales in 2024 was 4.7, 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. Wales came in the top half of rankings with a favourability rank of 24 out of 50 NBI nations.

The below table shows favourability towards Wales from 2020 to 2024. Wales's mean favourability score has remained largely stable, having increased slightly from 4.7 in 2020 to 4.8 in 2023, it returned to 4.7 in 2024. However, Wales's favourability rank is three places lower in 2024, compared to 2020 (21st in 2020; 23rd in 2023 and 24th in 2024).

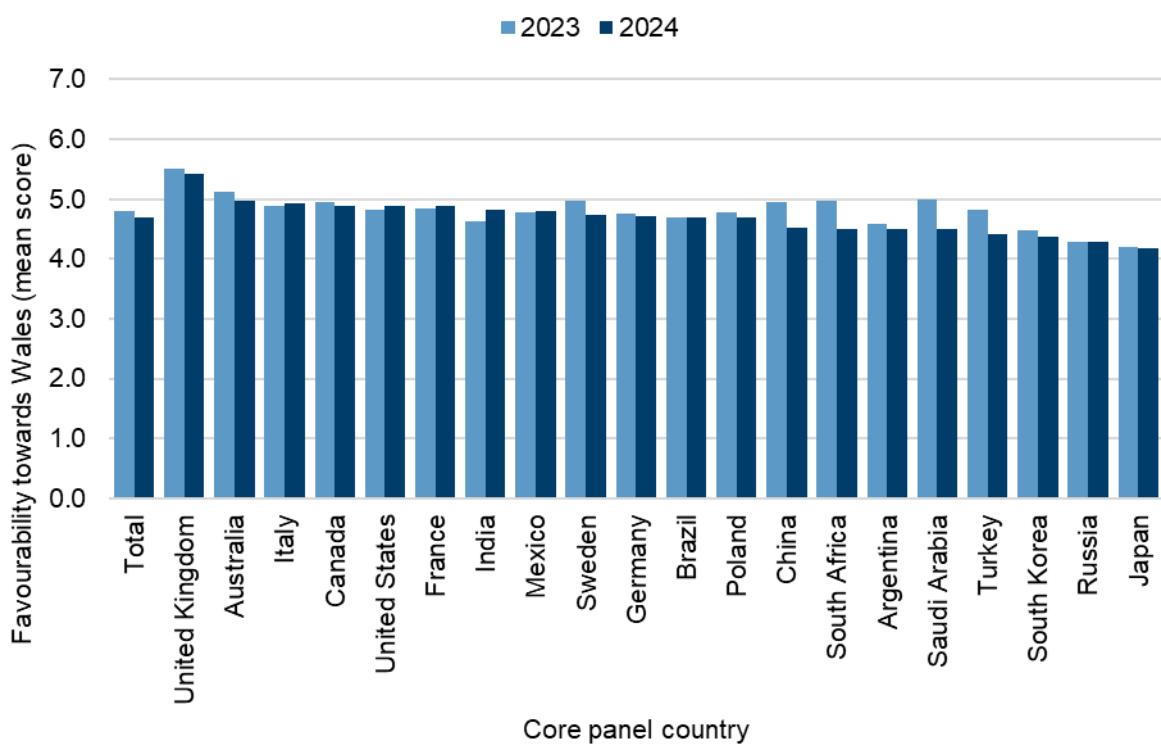
Table 6: 2020 to 2024 Nation Brands Index, Wales's favourability score and rank over time

Measure	2020	2023	2024
Mean favourability score	4.7	4.8	4.7
Rank	21	23	24

Source: Anholt Nation Brands Index®, 2020 to 2024

Figure 3 shows the levels of favourability scored towards Wales across the 20 core panel countries. The highest mean favourability score came from the UK (5.4) and Australia (5.0). Wales's lowest mean favourability scores were from Japan (4.2), Russia (4.3), South Korea (4.4) and Turkey (4.4). However, these favourability scores were still above the 'neutral' mid-point of the scale. Although scores across panel countries remained relatively stable between 2023 and 2024, there were some slight decreases in favourability seen from South Africa (from 5.0 in 2023 to 4.5 in 2024), Saudi Arabia (from 5.0 in 2023 to 4.5 in 2024), China (from 5.0 in 2023 to 4.5 in 2024), and Turkey (from 4.8 in 2023 to 4.4 in 2024). The highest increase, although small were seen from India (from 4.6 in 2023 to 4.8 in 2024).

Figure 3: 2023 to 2024 Nation Brands Index, Wales's favourability score across 20 core panel countries



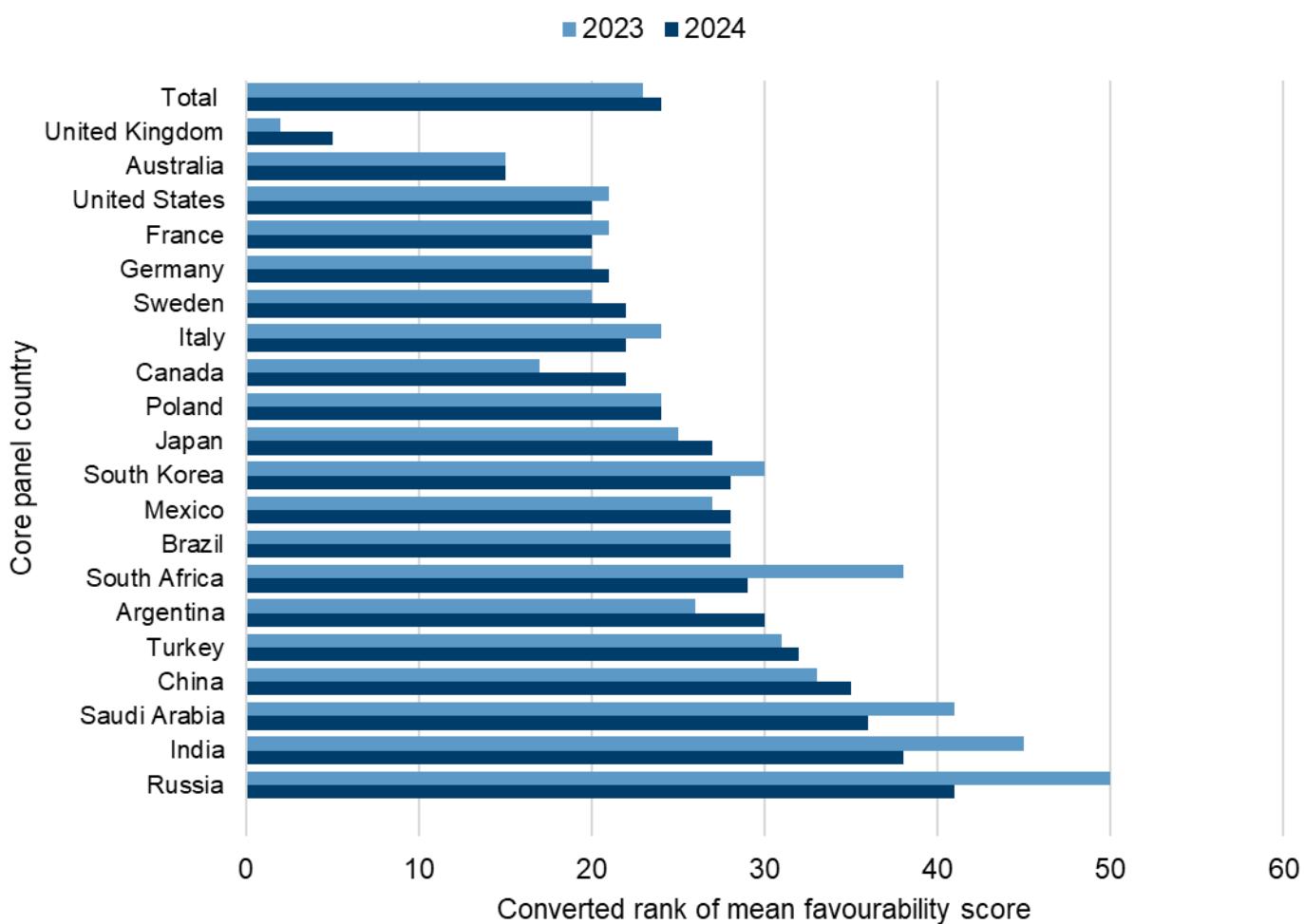
Source: Anholt Nation Brands Index®, 2023 and 2024

Figure 4 shows the levels of favourability rankings towards Wales across the 20 core panel countries. The highest ranking came from the UK (5th) and Australia (15th). Wales's lowest rankings were from Russia (41st), India (38th) and Saudi Arabia (36th). Although Wales

received a low favourability ranking from Saudi Arabia, it also received an above average favourability score from the same country, demonstrating the importance of distinguishing between scores and rankings.

There were some substantial changes in favourability rankings between 2023 and 2024, however this may be in part due to the changes in the number of nations involved dropping from 60 to 50 nations. The biggest increase in ranking can be seen by South Africa (from 38th in 2023 to 29th in 2024) and Russia (from 50th in 2023 to 41st in 2024). The biggest decrease was seen by Canada (from 17th in 2023 to 22nd in 2024).

Figure 4: 2023 to 2024 Nation Brands Index, Wales's favourability ranking across 20 core panel countries



Source: Anholt Nation Brands Index®, 2023 and 2024

Familiarity

In 2024 NBI survey, respondents were asked to rate how well they felt they knew each country, using a scale from 1.0 to 5.0. Overall familiarity is presented as the percentage of respondents who stated they knew Wales 'very well', 'somewhat well', or 'just a little'. 56%

of respondents reported at least some familiarity with Wales, producing a familiarity ranking of 44th out of the 50 NBI nations.

Table 7 below shows overall familiarity with Wales from 2020 to 2024. The percentage of respondents who reported at least some familiarity with Wales in 2024 was four percentage points lower than in 2023 (60% in 2024; 56% in 2024). However, Wales's overall familiarity ranking was four places higher in 2024, compared to 2023 (48th in 2023; 44th in 2024).

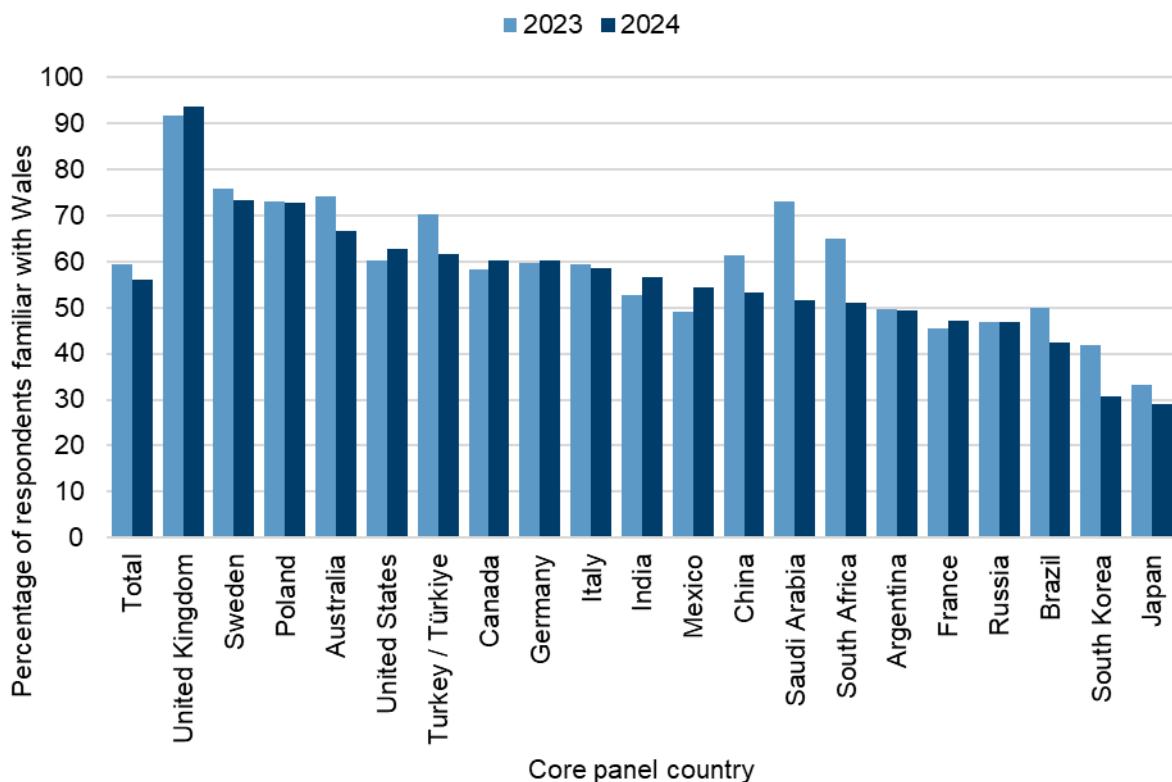
Table 7: 2020 to 2024 Nation Brands Index, Wales's familiarity score and rank over time

Measure	2020	2023	2024
% familiar with Wales	53%	60%	56%
Rank	45	48	44

Source: Anholt Nation Brands Index®, 2020 to 2024

Figure 5 shows levels of familiarity with Wales across the 20 core panel countries. In 2024, familiarity with Wales was highest in the UK (94%), followed by Sweden (73%) and Poland (73%). Japan (29%) and South Korea (31%) had the lowest levels of familiarity with Wales.

Figure 5: 2023 to 2024 Nation Brands Index, familiarity with Wales by panel country



Source: Anholt Nation Brands Index®, 2023 and 2024

The countries with the highest and lowest familiarity with Wales has remained broadly similar since 2023. In 2023 United Kingdom (92%), Sweden (76%), Australia (74% and

Poland (73%) were all among the five countries with the highest level of overall familiarity with Wales. However, one notable difference is that in 2023 Saudi Arabia was among one of the highest countries who were familiar with Wales with (73% familiarity with Wales). In 2024, 52% of respondents said they were familiar with Wales, a 21 percentage point difference. Decreases were also seen for South Africa (65% in 2023; 51% in 2024) and South Korea (42% in 2023; 31% in 2024).

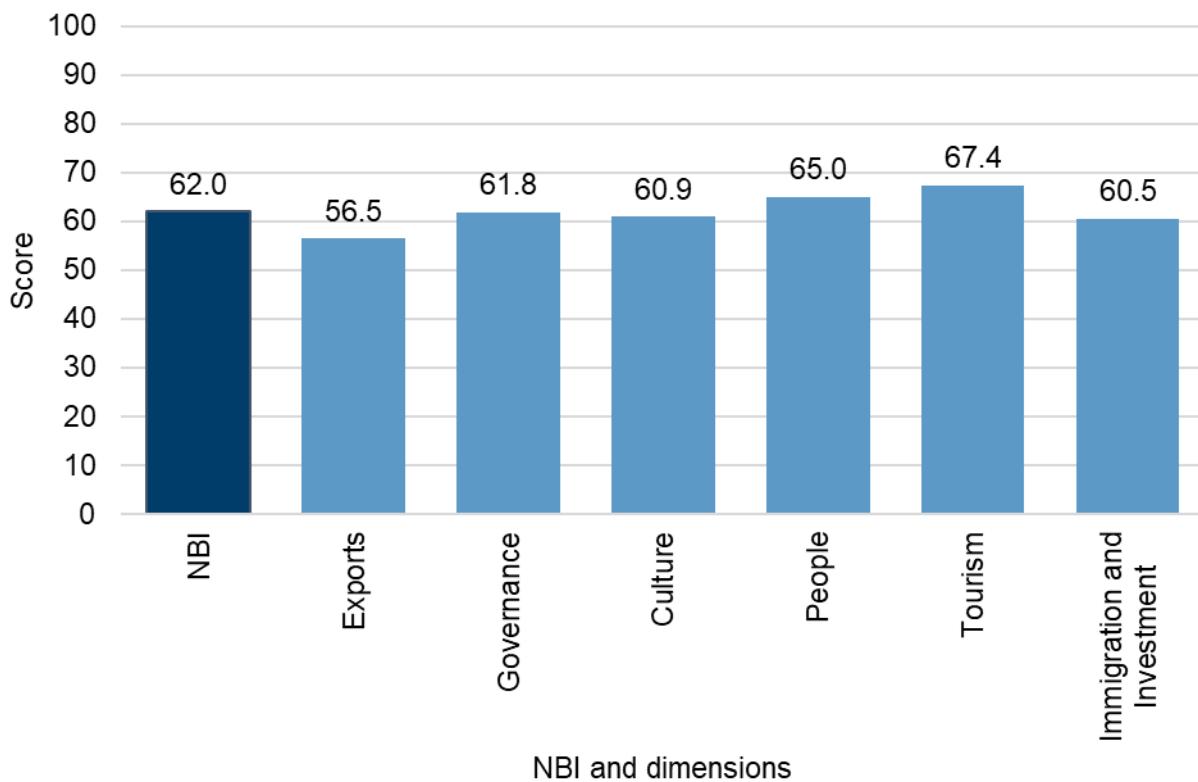
NBI dimensions performance

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'.

Wales's scores across all six dimensions in 2024 are shown in figure 6. Wales's rankings across all six dimensions in 2024 are shown in figure 8.

Figure 6 shows that Wales received relatively consistent scores across all dimensions. Its highest dimension score for 'Tourism' (67.4) followed by 'People' (65.0). Wales's lowest dimension score was for 'Exports' (56.5).

Figure 6: 2024 Nation Brands Index, Wales's overall NBI and dimension scores

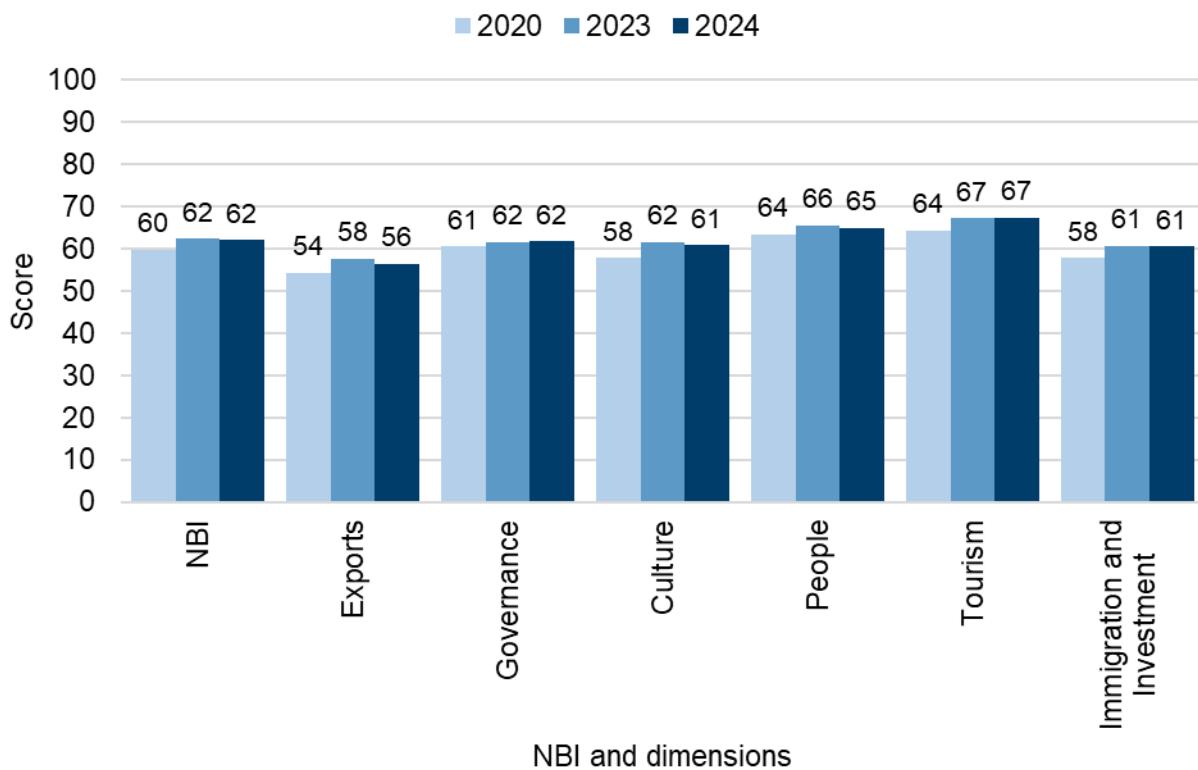


Source: Anholt Nation Brands Index®, 2024

Figure 7 shows Wales's dimension scores between 2020 and 2024. 'People', 'Tourism' and 'Governance' are Wales highest scoring dimensions, receiving the highest scores in 2020, 2023 and 2024. Similarly, Wales received its lowest dimension score for 'Exports' in each of these years.

Looking at scores over time, scores seem to peak slightly for 2023, with scores increasing across all dimensions when compared to 2020. In 2024 scores across all dimensions either decreased slightly or remained the same, compared to 2023. The greatest decreases in scores from 2023 to 2024 were seen for 'Exports', 'Culture' and 'People'. However, scores across all dimensions were higher in 2024, compared to 2020.

Figure 7: 2020 to 2024 Nation Brands Index, Wales's overall NBI and dimension scores

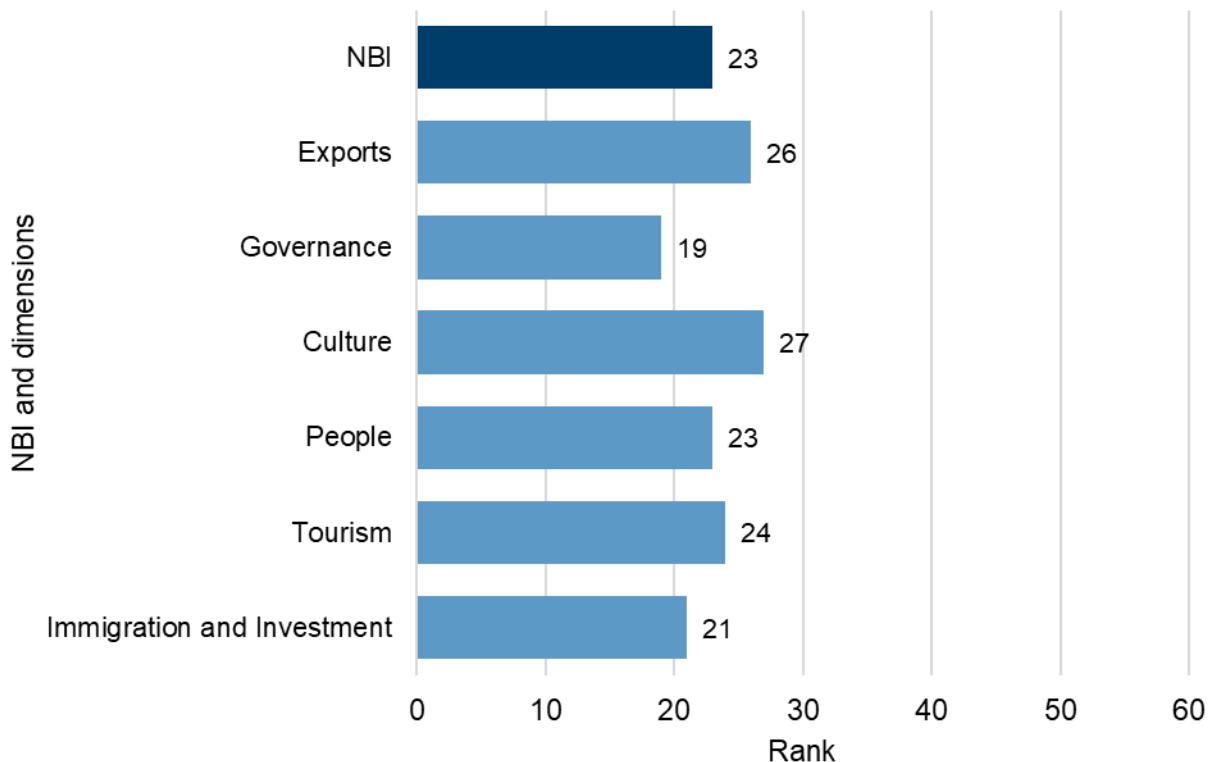


Source: Anholt Nation Brands Index®, 2020 to 2024

Wales also received generally consistent rankings across the dimensions, ranging from 19th to 27th place out of 50 nations. In 2024, Wales ranked in the top half of the NBI nations across all dimensions, apart from 'Exports' (26th) and 'Culture' (27th).

Figure 8 shows that Wales's highest ranking was 'Governance', at 19th out of 50 countries, followed by 'Immigration and Investment' (21st) and 'People' (23rd). Wales received its lowest dimension ranking for 'Culture' at 27th.

Figure 8: 2024 Nation Brands Index, Wales's overall NBI and dimension rankings



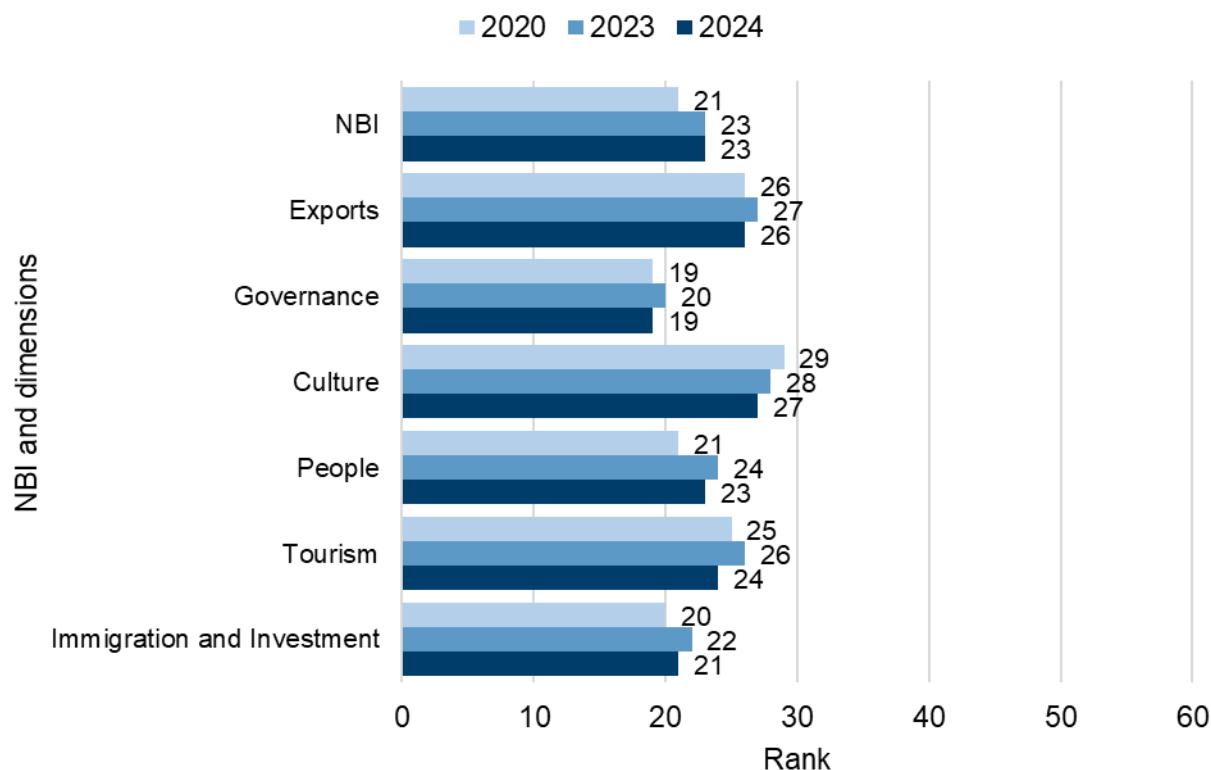
Source: Anholt Nation Brands Index®, 2024

Below compares Wales's dimension rankings between 2020 and 2024. Wales received its highest rankings for the same dimensions for 2020, 2023 and 2024. The highest rankings across these years were for 'Governance', 'Immigration and Investment', and 'People'. Likewise, 'Culture' was the lowest ranked dimension for Wales in 2020, 2023 and 2024.

Trends in the data suggest that rankings across most dimensions either remained the same or worsened between 2020 and 2023, apart from 'Culture' which improved.

When looking across all years the biggest improvements can be seen in dimension ranking scores for 'Culture' from 29th in 2020 to 27th in 2024. Slight improvements in dimension rankings were also seen in 'Tourism' (25th in 2020, 26th in 2023, and 24th in 2024) and 'Immigration and Investment' (20th in 2020, 22nd in 2023, and 21st in 2024). As mentioned previously this is in contrast to scores where we see that in 2024 scores across all dimensions either decreased slightly or remained the same. This again highlights the importance of looking at both scores and rankings.

Figure 9: 2020 to 2024 Nation Brands Index, Wales's overall NBI and dimension rankings



Source: Anholt Nation Brands Index®, 2020 to 2024

NBI dimensions by country

Further analysis was undertaken to assess scores and ranks for each dimension by core panel country. The scores are presented in table 8 and rankings are in table 9.

Although scores are relatively mixed for each dimension, there are some consistent findings across the countries. India and the United Kingdom gave Wales some of its highest scores across most of the dimensions out of all of the panel countries where as Japan, Russia and South Korea gave Wales some of its lowest.

Table 8: 2024 Nation Brands Index, dimension scores for Wales by country

	Exports	Governance	Culture	People	Tourism	Immigration/ Investment
Total	56.5	61.8	60.9	65.0	67.4	60.5
Argentina	54.0	58.4	58.6	65.0	69.2	60.9
Australia	55.8	63.9	62.7	69.9	69.5	60.9
Brazil	60.9	63.5	62.1	65.6	70.2	65.3
Canada	56.5	62.8	62.5	69.0	69.4	60.2
China	57.9	61.1	59.8	61.0	61.7	60.6
France	56.8	61.4	62.2	67.6	68.2	58.2
Germany	55.9	63.6	59.7	66.4	69.0	56.3
India	63.1	69.9	68.5	71.6	72.4	70.8
Italy	56.2	61.3	58.2	65.0	69.5	59.9
Japan	50.8	52.8	53.5	53.6	54.1	48.3
Mexico	58.1	63.0	63.4	69.0	72.1	66.5
Poland	55.2	60.7	57.5	63.5	68.1	59.2
Russia	50.9	51.4	57.8	56.2	61.9	51.4
Saudi Arabia	59.9	62.8	63.0	63.8	66.1	62.9
South Africa	57.6	66.7	66.0	68.5	71.2	68.7
South Korea	51.9	59.2	57.2	57.0	59.3	55.6
Sweden	54.7	61.8	59.1	66.9	67.6	58.8
Turkey / Türkiye	53.7	58.5	58.3	60.4	66.0	59.8
United Kingdom	60.7	66.3	64.9	69.9	73.2	63.4
United States	57.4	63.4	62.3	67.2	68.3	60.5

Source: Anholt Nation Brands Index®, 2024

Similarly, ranks are relatively mixed for each dimension. With 'Exports' for example, ranks range from 17 to 42. However, there are some consistent findings across the countries.

Australia, France and the United Kingdom gave Wales some of its highest rankings across the dimensions, whereas India, Russia and Saudi Arabia gave Wales some of its lowest.

Table 9: 2024 Nation Brands Index, dimension ranks for Wales by country

	Exports	Governance	Culture	People	Tourism	Immigration/ Investment
Total	26	19	27	23	24	21
Argentina	34	22	33	29	31	27
Australia	23	12	18	11	17	14
Brazil	26	19	30	27	27	21
Canada	24	17	23	18	22	21
China	35	30	38	32	34	25
France	21	13	11	4	15	18
Germany	25	15	22	18	22	21
India	42	32	39	31	35	31
Italy	27	20	21	18	18	22
Japan	22	23	21	24	28	20
Mexico	35	25	33	30	31	27
Poland	30	21	26	25	28	24
Russia	40	38	36	41	43	34
Saudi Arabia	36	35	38	37	40	34
South Africa	35	16	27	29	31	24
South Korea	26	23	29	25	31	23
Sweden	24	18	26	18	22	20
Turkey / Türkiye	32	26	34	36	34	29
United Kingdom	17	11	13	14	12	13
United States	25	13	26	16	20	17

Source: Anholt Nation Brands Index®, 2024

4. Conclusions

In 2024, Wales participated in the Anholt Nation Brands Index®. 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.

Wales ranked in 23rd place overall out of 50 countries, in the upper half of the NBI, with an overall NBI score of 62.0. Countries which scored higher than Wales were, in the main, high income democracies, mostly in Western Europe. Rankings have remained largely stable, with a slight decrease from 21st place in 2020 to 22nd place in 2021 and 2022, and 23rd place between 2023 and 2024. Wales's scores have also remained relatively stable during this period

Wales achieved an above average favourability score, with a mean favourability score of 4.7 (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 and Australia). Wales's mean favourability score has remained largely stable, having increased slightly from 4.7 in 2020 to 4.8 in 2023, it returned to 4.7 in 2024. Wales's favourability rank is three places lower in 2024, compared to 2020 (21st in 2020; 23rd in 2023 and 24th in 2024).

A total of 56% of respondents reported at least some familiarity with Wales, producing a familiarity ranking of 44th out of the 50 NBI nations. The percentage of respondents who reported at least some familiarity with Wales in 2024 was four percentage points lower than in 2023 (60% in 2023; 56% in 2024). However, Wales's overall familiarity ranking was four places higher in 2024, compared to 2023 (48th in 2023; 44th in 2024).

Wales received consistent rankings across the dimensions, with rankings ranging from 19th to 27th place out of 50 nations. Wales ranked in the top half of the NBI nations across all dimensions, apart from 'Exports' and 'Culture'.

Wales's highest ranking was 'Governance', at 19th out of 50 countries, followed by 'Immigration and Investment' (21st) and 'People' (23rd). Wales received its lowest dimension ranking for 'Culture' at 27th.