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The Anholt Nation Brands Index: 2025 Report for Wales

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The Anholt Nation Brands Index: 2025 Report for Wales

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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 2025 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 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 provides insight in to how Wales is perceived globally and support in identifying opportunities to strengthen Wales as an international brand.

In 2025, the NBI was conducted in 20 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 20 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 2025 NBI survey. For the purpose of continuity with previous NBI waves, Anholt & Co commissioned Ipsos Observer to conduct the fieldwork from 2024.

Core panel countries

In 2025 approximately 40,000 respondents from 20 core panel countries participated in the 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. Fieldwork was conducted from July to August 2025 for all 20 core panel countries. The 20 core panel countries in 2025 are listed below and were the same as in previous years of the NBI.

Table 1: 2025 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	Saudi Arabia, South Africa

Source: Anholt Nation Brands Index®, 2025

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 2025 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 2025 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 2025 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 2025 NBI measured the image of 50 nations. In 2024, the number of countries ranked decreased from 60 to 50.

The list of 50 nations is based on the political and economic importance of the nations in global geopolitics and the flow of trade, businesses, people, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems are taken into consideration to make the study truly global. NBI subscription members' interests are also reflected in the selection of the countries.

In 2025 nations that were removed were Slovakia, Indonesia, Peru, Egypt, South Africa, United Arab Emirates. Bulgaria, Latvia, Lithuania, Slovenia, the Philippines and Namibia were added.

Table 2: 2025 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	Bulgaria, Czechia, Estonia, Latvia, Lithuania, Poland, Romania, Russia, Slovenia, Türkiye, Ukraine
Asia-Pacific	Australia, China, India, Japan, New Zealand, Philippines, Singapore, South Korea, Taiwan

Latin America	Argentina, Brazil, Chile, Mexico
Middle East / Africa	Israel, Kenya, Namibia, Palestine, Saudi Arabia

Source: Anholt Nation Brands Index®, 2025

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 2025 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 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: 2025 Nation Brands Index, dimension outline

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

	3) Whether respondents think each nation behaves responsibly in international peace and security 4) Whether respondents think each nation behaves responsibly to protect the environment 5) Whether respondents think each nation behaves responsibly to help reduce world poverty
Culture	1) Whether respondents feel each nation excels at sports 2) Whether respondents feel each nation has a rich cultural heritage 3) Whether respondents consider each nation as an interesting/exciting place for contemporary culture such as music, films, art and literature
People	1) Whether respondents felt that people from each nation would make them feel very welcome 2) Whether respondents would like a person from each nation as a close friend 3) Respondents' willingness to hire well-qualified people from each nation
Tourism	1) Whether respondents would like to visit a nation if money was no object 2) Whether respondents feel each nation is rich in natural beauty 3) Whether respondents think each nation is rich in historic buildings and monuments 4) 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

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 2025 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, data from the 2023 Russian panel was used, 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. The Welsh Government did not purchase subscriptions in 2021 or 2022; therefore, most data for Wales are unavailable for these years. In 2024 and 2025 Wales purchased retrospective reports 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 2025 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 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 2025, Wales achieved its highest Nation Brands Index (NBI) score, rising to 62.7 out of 100. Despite this improvement in score, Wales's overall ranking fell to 25th place from 23rd place in 2024. This continues the pattern seen over the past several years, where Wales's absolute scores have remained steady or improved slightly, while its rank has shifted within a narrow band.

Between 2020 and 2025, Wales's position has remained broadly stable, moving from 21st place in 2020 to 22nd place in both 2021 and 2022, 23rd place in 2023 and 2024, and then

to 25th place in 2025. Overall, Wales's NBI performance shows consistency over time, with limited year-on-year variation in both scores and rankings.

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: 2025 Nation Brands Index, Wales's overall rankings and scores over time

Measure	2020	2021	2022	2023	2024	2025
Rank	21	22	22	23	23	25
Score	59.8	62.5	61.9	62.4	62.0	62.7

Source: Anholt Nation Brands Index®, 2020 to 2025

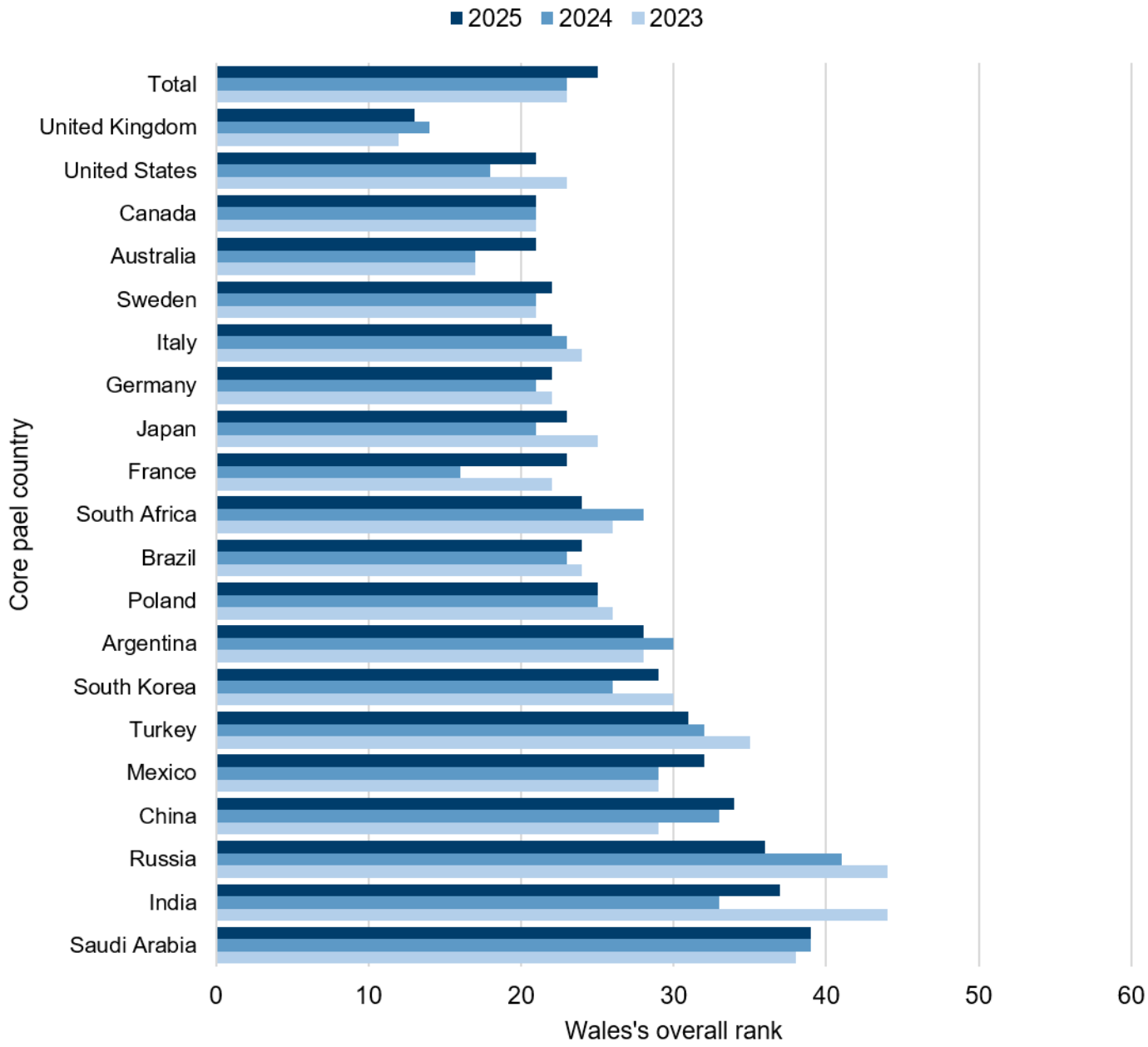
Wales's Reputation in the Core Panel Countries

Figure 1 shows the overall NBI rankings received for Wales by each of the core panel countries from 2023 to 2025. On average, the regions where Wales's reputation was strongest continued to be Western Europe and North America, where Wales received several of its highest rankings.

In 2025, the strongest rankings for Wales came from the United Kingdom (13th), the United States, Canada, Australia (all ranked Wales 21st), Sweden, Italy, and Germany (all ranked Wales 22nd), indicating that perceptions remain most positive among culturally and economically aligned nations.

There were marked shifts in several country-level rankings between 2024 and 2025. The largest improvements were seen from Russia, where Wales moved from 41st in 2024 to 36th in 2025, and from South Africa, which increased from 28th to 24th. Conversely, the largest declines were seen from France (16th to 23rd), Australia (17th to 21st) and India (33rd to 37th). These changes should be interpreted with caution, as year-on-year movement can reflect changes in relative rather than absolute performance, particularly in a competitive index where many countries show simultaneous improvements.

Figure 1: 2023 to 2025 Nation Brands Index, Wales's overall NBI rank by core panel country



Source: Anholt Nation Brands Index®, 2023 to 2025

Figure 2 shows the overall NBI scores received for Wales by each of the core panel countries from 2023 to 2025. Scores remained relatively stable between 2024 and 2025, although several countries show small increases or decreases.

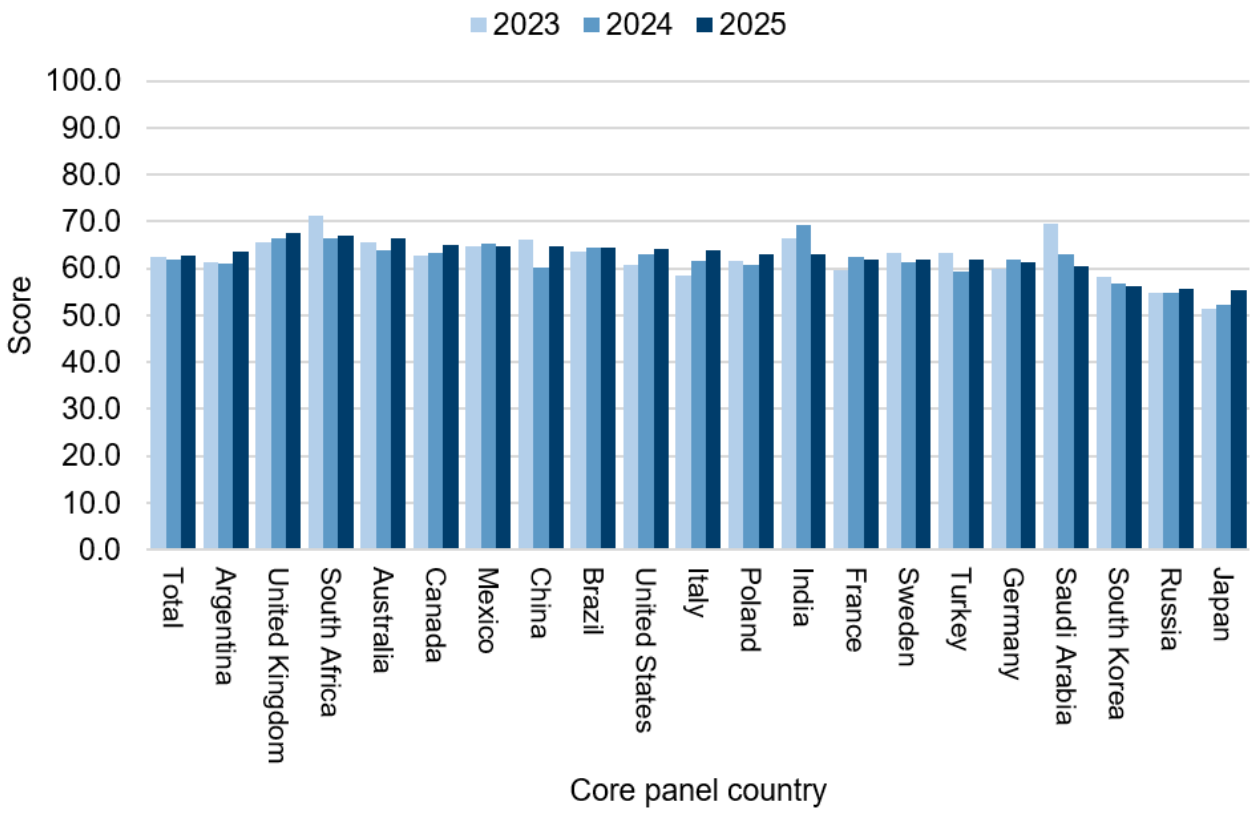
In 2025, the core panel countries awarding the highest scores to Wales were the United Kingdom (67.5), South Africa (66.9), Australia (66.5) and Canada (65.2), indicating consistently strong perceptions across these markets.

Some notable year-on-year changes are visible between 2024 and 2025. The largest increases in scores came from China (60.3 to 64.6), Japan (52.2 to 55.5), Australia (63.8 to 66.5), and Argentina (61.0 to 63.7). Smaller increases can also be seen from Poland (60.7 to 63.1) and Turkey (59.5 to 61.8).

Conversely, several countries recorded decreases in their scores for Wales between 2024 and 2025. The largest decline came from India, dropping from 69.4 in 2024 to 63.0 in 2025, followed by Saudi Arabia, which fell from 63.1 to 60.6.

Overall, while individual country scores fluctuated, the broad pattern remains stable, with most panel countries continuing to view Wales positively and scoring it within a relatively narrow range.

Figure 2: 2023 to 2025 Nation Brands Index, Wales's overall NBI score by core panel country



Source: Anholt Nation Brands Index®, 2023 to 2025

Favourability

The NBI 2025 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.

In 2025, Wales recorded a favourability score of 4.6 out of 7, a slight decrease from 4.7 in 2024. This small year-on-year decline reflects a continuation of the long-term pattern in which Wales's favourability scores have stayed relatively consistent, fluctuating only marginally over the six-year period.

Between 2020 and 2025, favourability rankings have similarly remained broadly stable. Wales ranked 21st in 2020, 23rd in 2023, 24th in 2024, and 25th in 2025, showing modest movement within a narrow range. Overall, Wales's favourability performance demonstrates steady perceptions internationally, with limited variation over time in both scores and rankings.

The below table shows favourability towards Wales from 2020 to 2025.

Table 6: 2020 to 2025 Nation Brands Index, Wales's favourability score and rank over time

Measure	2020	2023	2024	2025
Mean favourability score	4.7	4.8	4.7	4.6
Rank	21	23	24	25

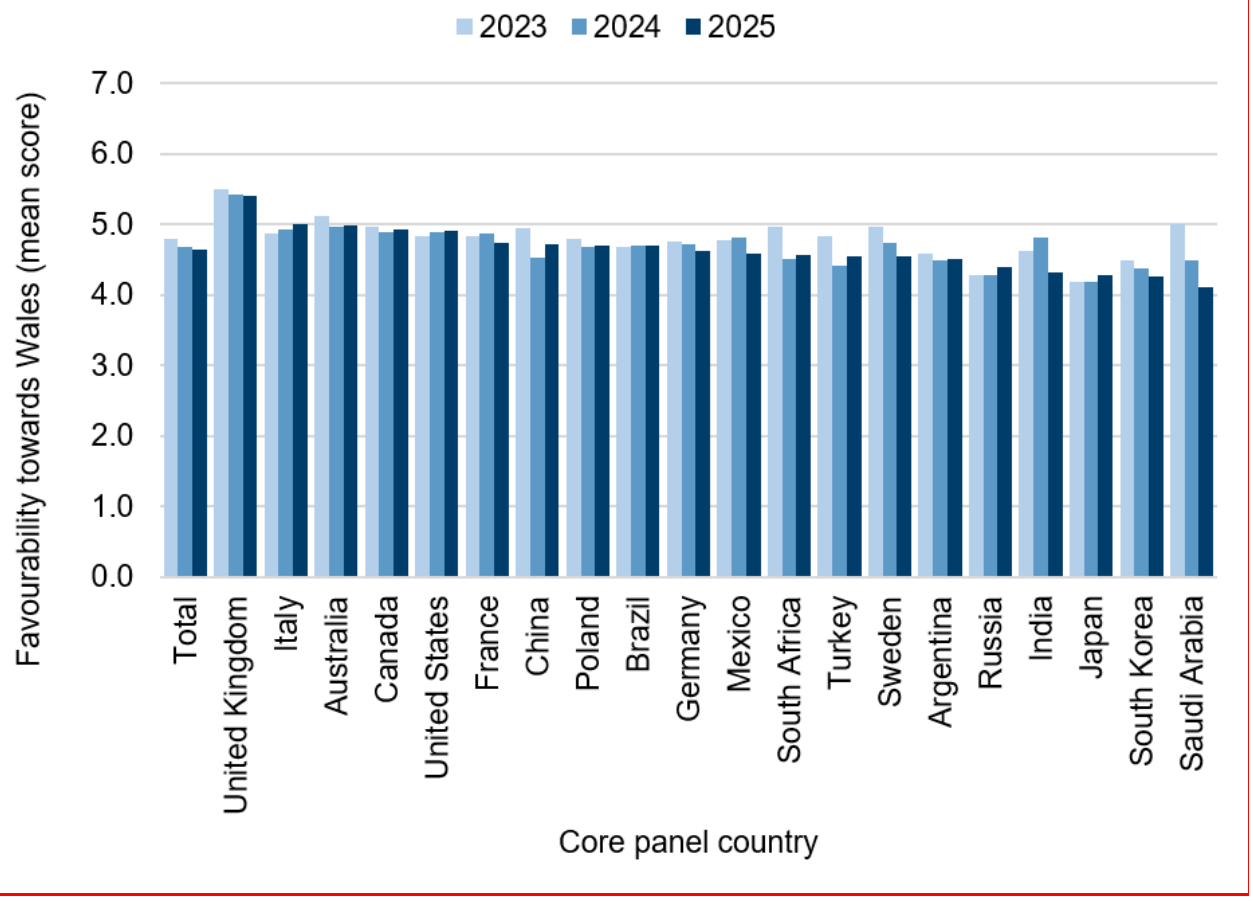
Source: Anholt Nation Brands Index®, 2020 to 2025

Figure 3 shows the levels of favourability scored towards Wales across the 20 core panel countries in 2025. The highest mean favourability scores came from the United Kingdom (5.4), Italy (5.0), Australia (5.0) Canada (4.9), and the United States (4.9), indicating consistently positive perceptions in these markets. Wales's lowest mean favourability scores were from Saudi Arabia (4.1), Japan (4.3), India (4.3) and South Korea (4.3). However, all scores remained above the neutral mid-point of the scale, suggesting generally positive attitudes across all panel countries.

There were some noticeable changes between 2024 and 2025. The largest decreases in favourability were seen from India, falling from 4.8 in 2024 to 4.3 in 2025, and Saudi Arabia, falling from 4.5 to 4.1. In contrast, a small increase was recorded for China, rising from 4.5 to 4.7.

Overall, while favourability scores fluctuated across countries, the majority remained within a narrow band, showing continued positive sentiment towards Wales across the international panel.

Figure 3: 2023 to 2025 Nation Brands Index, Wales's favourability score across 20 core panel countries

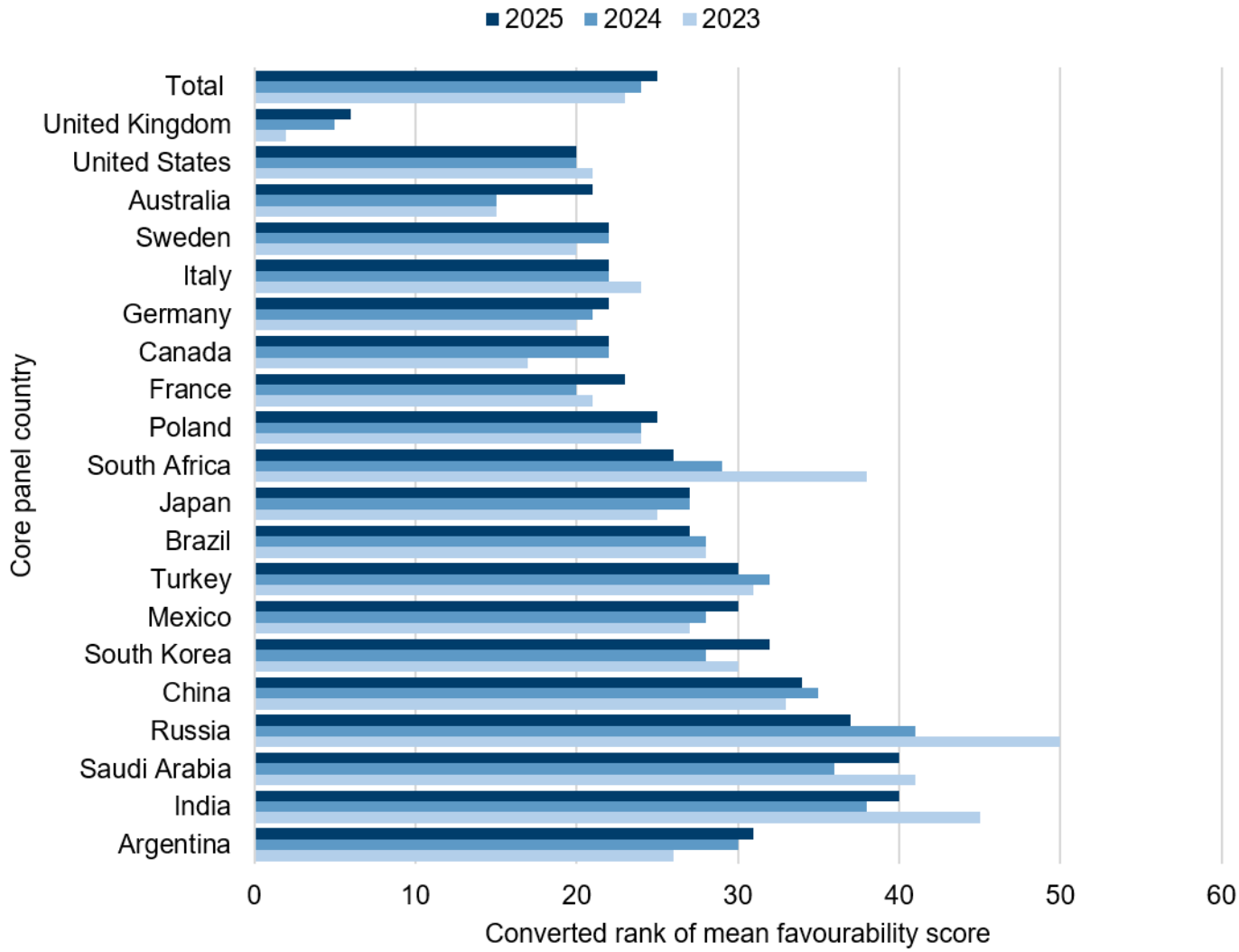


Source: Anholt Nation Brands Index®, 2023 to 2025

Figure 4 shows the favourability rankings given to Wales across the 20 core panel countries in 2025. The highest rankings came from the United Kingdom (6th), the United States (20th), Australia (21st), Sweden, Italy, Germany and Canada (all 22nd), indicating relatively strong favourability in these markets. Wales's lowest rankings were from India (40th), Saudi Arabia (40th) and Russia (37th). This illustrates the importance of interpreting scores and rankings together: despite low favourability rankings from these countries, their favourability scores remained above the neutral midpoint.

There were some notable shifts in favourability rankings between 2024 and 2025. The largest increases were seen from Russia, improving from 41st in 2024 to 37th in 2025, and South Africa, rising from 29th to 26th. Several countries saw decreases in their rankings, most notably Australia (from 15th to 21st) and Saudi Arabia (from 36th to 40th), as well as South Korea (from 28th to 32nd). These changes are largely driven by year-on-year variations in relative performance between countries rather than indicating major shifts in perceptions of Wales.

Figure 4: 2023 to 2025 Nation Brands Index, Wales's favourability ranking across 20 core panel countries



Source: Anholt Nation Brands Index®, 2023 and 2025

Familiarity

In 2025, Wales's familiarity score decreased to 53%, down from 56% in 2024. This represents a modest decline following the higher levels recorded in 2023 and 2024, and places Wales 42nd overall in 2025 compared with 44th in 2024.

Between 2020 and 2025, familiarity has shown more variability than other NBI measures. Rankings have shifted from 45th place in 2020 to 48th in 2023, 44th in 2024, and 42nd in 2025. Although these movements indicate some fluctuation in awareness of Wales, the overall trend remains one of moderate familiarity, with scores staying within a relatively narrow band over the six-year period.

Table 7: 2020 to 2025 Nation Brands Index, Wales's familiarity score and rank over time

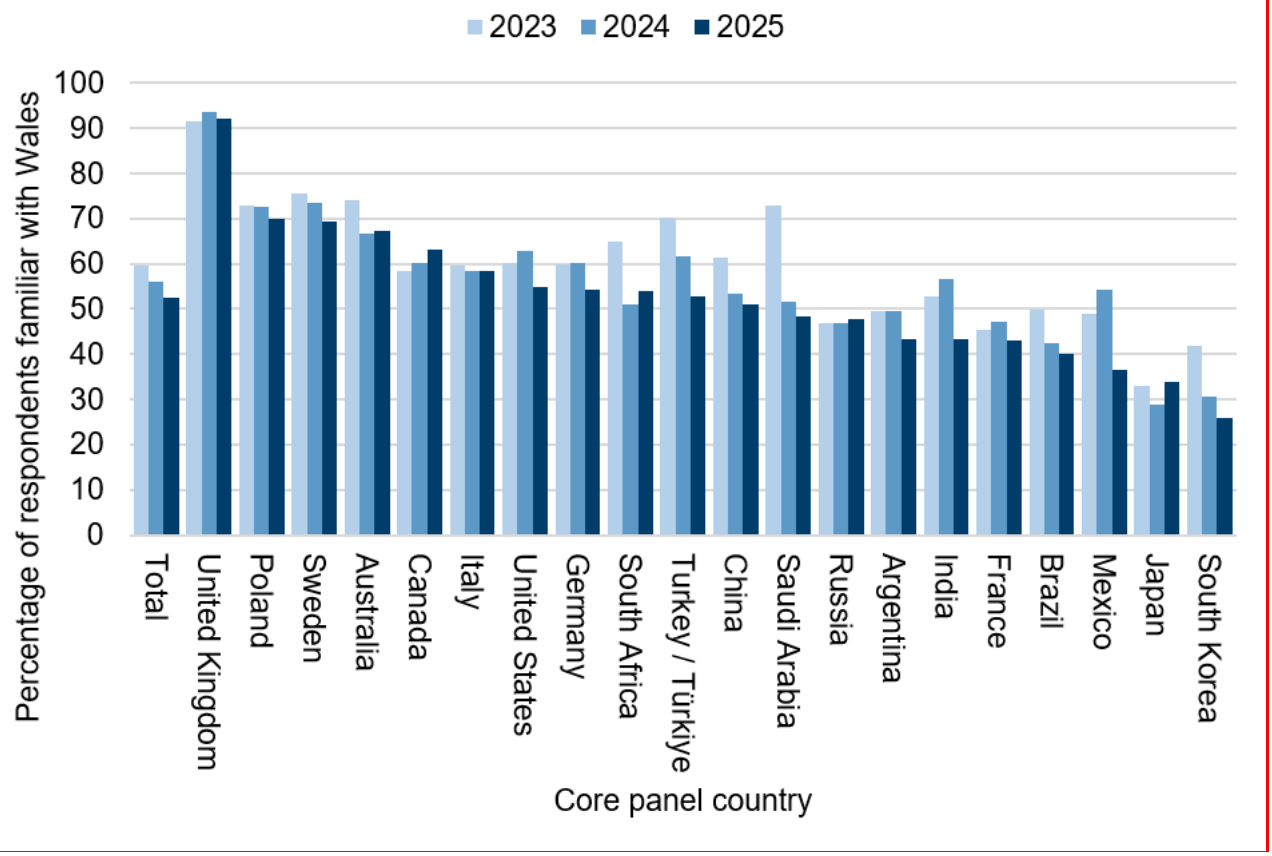
Measure	2020	2023	2024	2025
% familiar with Wales	53%	60%	56%	53%
Rank	45	48	44	42

Source: Anholt Nation Brands Index®, 2020 to 2025

Figure 5 shows levels of familiarity with Wales across the 20 core panel countries in 2025. Familiarity with Wales was highest in the United Kingdom (92%), followed by Poland (70%), Sweden (69%), and Australia (67%). The lowest levels of familiarity were recorded in South Korea (26%), Japan (34%), Mexico (37%), and Brazil (40%), indicating more limited awareness of Wales in these markets compared with Europe and North America.

Compared with 2024, levels of familiarity showed mixed year-on-year changes. Familiarity increased in several countries, most notably Japan (from 29% to 34%), South Africa (from 51% to 54%), and Canada (from 60% to 63%), suggesting strengthening awareness of Wales in these markets. However, familiarity fell in a number of countries, with the largest decreases seen in Mexico (from 54% to 37%), India (from 57% to 43%), and Turkey (from 62% to 53%). Despite these shifts, overall familiarity scores remain within a broadly similar range to previous years, reflecting continued variation in awareness across global markets.

Figure 5: 2023 to 2025 Nation Brands Index, familiarity with Wales by panel country



Source: Anholt Nation Brands Index®, 2023 to 2025

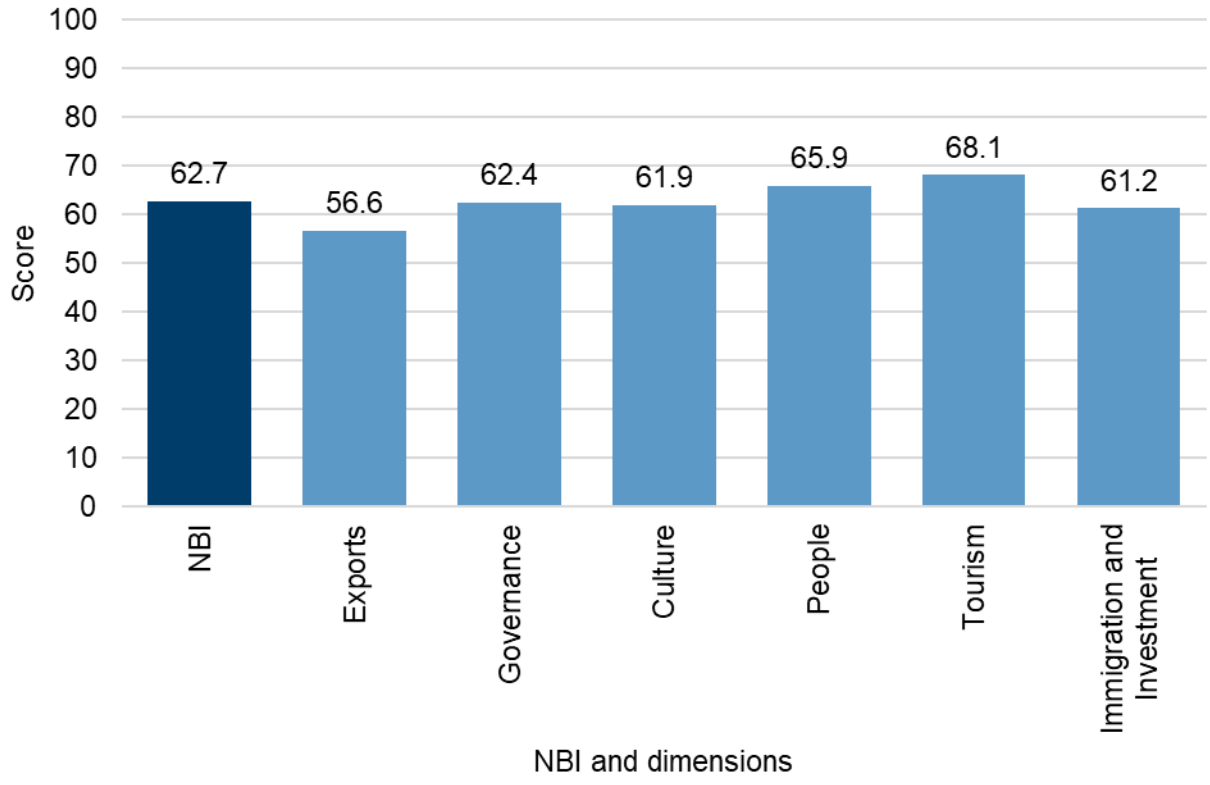
NBI dimensions performance

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 2025 are shown in figure 6. Wales’s rankings across all six dimensions in 2025 are shown in figure 8.

Figure 6 shows that Wales continued to receive relatively consistent scores across all dimensions in 2025. Its highest dimension score was for Tourism (68.1), followed by People (65.9). Wales’s lowest dimension score remained Exports (56.6).

Figure 6: 2025 Nation Brands Index, Wales's overall NBI and dimension scores

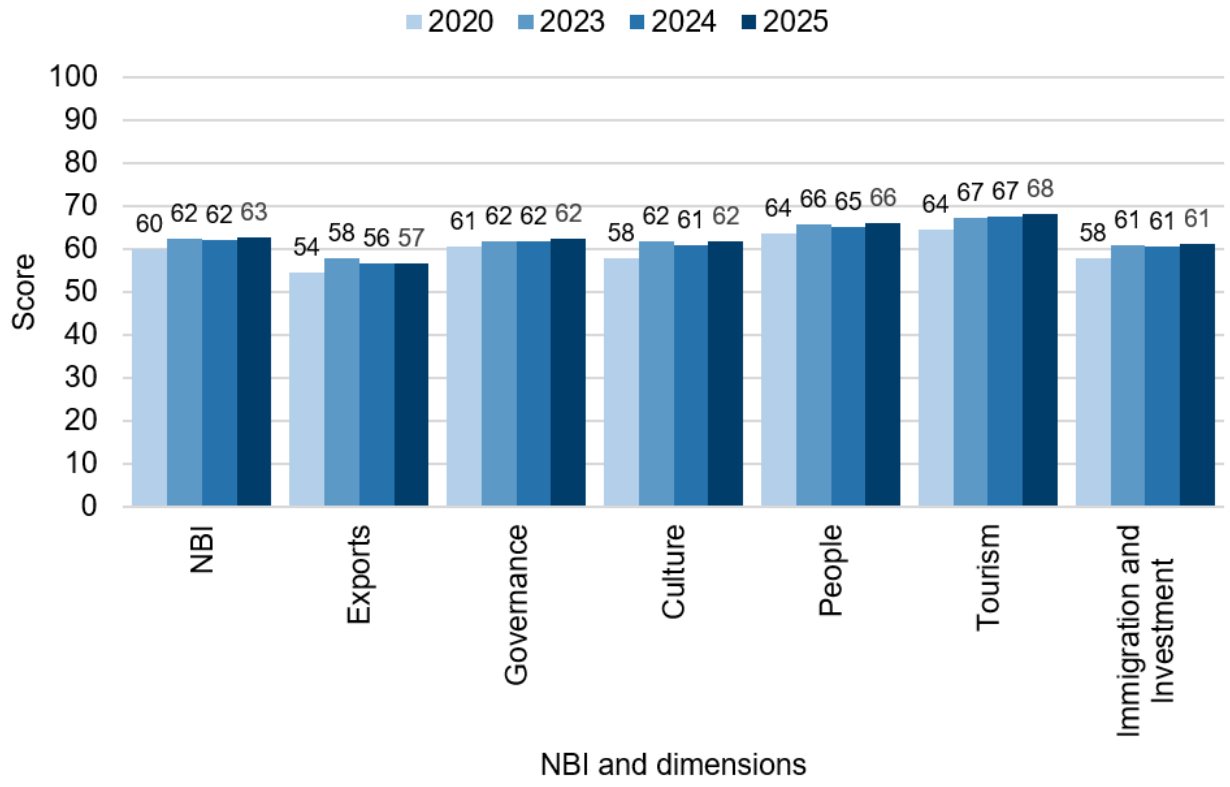


Source: Anholt Nation Brands Index®, 2025

Figure 7 shows Wales's dimension scores between 2020 and 2025. Across this period, People, Tourism, and Governance remain Wales's highest-scoring dimensions, receiving the strongest scores in 2020, 2023, 2024 and again in 2025. Wales continued to receive its lowest dimension score for Exports in every year of the series, including 2025.

Looking at trends over time, scores peaked slightly in 2023, with increases across all dimensions when compared with 2020. In 2024, scores across all dimensions either decreased slightly or remained broadly stable relative to 2023, with the largest falls recorded for Exports, Culture, and People. In 2025, scores increased again for most dimensions, including notable rises in Tourism, Culture, and People, although Exports and Governance saw only marginal changes. Overall, all dimension scores in 2025 remain higher than in 2020, demonstrating a generally positive long-term trend despite year-to-year fluctuations.

Figure 7: 2020 to 2025 Nation Brands Index, Wales's overall NBI and dimension scores

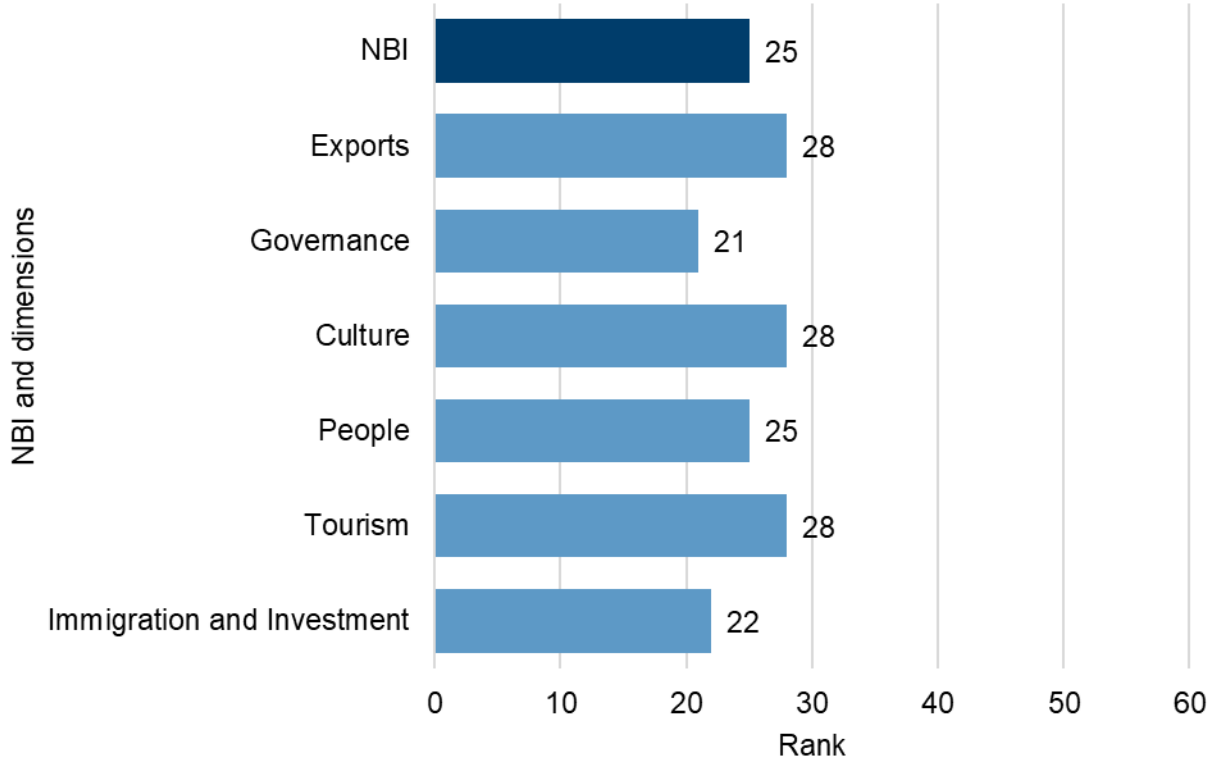


Source: Anholt Nation Brands Index®, 2020 to 2025

Wales also received generally consistent rankings across the dimensions in 2025, ranging from 21st to 28th place out of 50 nations. In 2025, Wales ranked in the top half of NBI nations across three dimensions – Governance, People, and Immigration and Investment. Exports, Culture and Tourism all sat slightly below the midpoint.

Figure 8 shows that Wales's highest-ranking dimensions in 2025 were Governance (21st), followed by Immigration and Investment (22nd) and People (25th). Wales received its lowest dimension rankings for Exports, Culture, and Tourism, all positioned at 28th in 2025.

Figure 8: 2025 Nation Brands Index, Wales's overall NBI and dimension rankings



Source: Anholt Nation Brands Index®, 2025

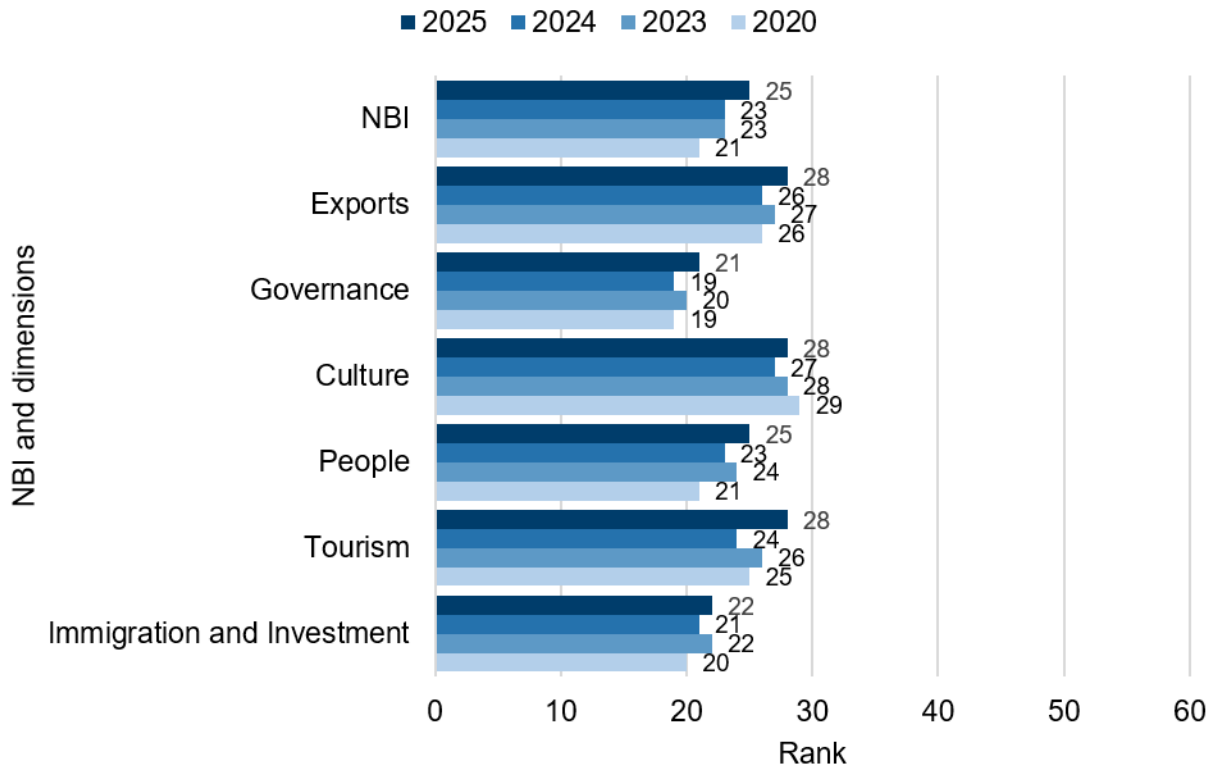
Below compares Wales's dimension rankings between 2020 and 2025. Wales continued to receive its highest rankings for the same dimensions across most years, with Governance, Immigration and Investment, and People remaining the strongest-performing areas throughout 2020, 2023, 2024 and again in 2025. Similarly, Culture remained one of Wales's lowest-ranked dimensions across the period, joined in 2025 by Exports and Tourism, all ranking 28th.

Trends in the data show that rankings across most dimensions either remained stable or worsened slightly between 2020 and 2023, apart from Culture, which improved during this period. In 2024, several dimensions saw modest improvements, most notably Tourism, before rankings dipped again for all dimensions in 2025.

When looking across all years, the biggest improvement continues to be in Culture, which increased from 29th in 2020 to 27th in 2024, before falling back slightly to 28th in 2025. Smaller improvements were also seen in Tourism, which moved from 25th in 2020 to 24th in 2024 before declining to 28th in 2025. As highlighted earlier, these ranking movements contrast with score trends, where most dimensions saw increases in 2023 and 2025. This

again underlines the importance of considering both scores and rankings together when interpreting NBI results.

Figure 9: 2020 to 2025 Nation Brands Index, Wales's overall NBI and dimension rankings



Source: Anholt Nation Brands Index®, 2020 to 2025

NBI dimensions by country

Further analysis was undertaken to assess the scores and ranks for each dimension by core panel country, with the scores presented in Table 8 and the rankings in Table 9. While the results vary across countries and dimensions, several consistent patterns can be identified in the 2025 data. The United Kingdom, Canada and Australia gave Wales some of its highest scores across multiple dimensions, including Overall NBI, Governance, People and Tourism. In contrast, Japan, South Korea and Russia provided some of Wales's lowest scores and rankings across a number of dimensions, including Exports, Culture and People.

These results reinforce the broader geographic pattern seen across the NBI, with Wales performing more strongly in markets where cultural, economic or historic ties may be stronger, and receiving lower scores in regions where overall familiarity with Wales is lower.

Table 8: 2025 Nation Brands Index, dimension scores for Wales by country

	Exports	Governance	Culture	People	Tourism	Immigration/Investment
Total	**56.6**	**62.4**	**61.9**	**65.9**	**68.1**	**61.2**

Argentina	57.2	61.1	61.7	67.6	70.7	64.2
Australia	57.4	65.8	65.5	73.0	73.1	64.0
Brazil	59.9	64.0	61.8	66.9	70.6	63.9
Canada	57.2	64.7	63.4	70.7	71.6	63.5
China	63.2	64.9	63.5	65.6	66.2	64.5
France	56.3	62.0	61.3	66.6	67.6	57.8
Germany	55.1	62.6	59.1	66.5	68.7	55.9
India	56.9	62.3	63.8	64.4	66.2	64.6
Italy	57.2	64.6	60.4	67.2	70.9	62.3
Japan	52.6	56.6	56.7	57.9	58.5	50.9
Mexico	57.5	62.7	62.5	68.9	70.8	65.6
Poland	55.9	63.2	60.8	66.3	70.6	62.0
Russia	51.7	53.5	58.7	55.1	61.7	52.5
Saudi Arabia	55.7	61.5	61.8	61.6	63.3	59.5
South Africa	57.0	65.9	67.5	70.1	72.3	68.7
South Korea	51.1	58.7	56.7	56.5	59.7	55.4
Sweden	54.2	62.3	59.1	68.5	68.2	58.7
Türkiye	56.4	60.9	61.5	63.0	67.0	62.1
United Kingdom	61.2	66.5	66.9	72.2	73.3	65.1
United States	58.2	64.5	64.1	68.0	69.1	61.9

Source: Anholt Nation Brands Index®, 2025

Similarly, rankings are relatively mixed for each dimension in 2025. For example, rankings for Exports range widely—from 17th to 43rd—highlighting substantial variation in how different countries assess Wales's performance in this area. Despite this variation, several consistent patterns emerge. Australia, Canada and the United Kingdom continued to give Wales some of its highest rankings across multiple dimensions, reflecting generally positive perceptions in these markets. In contrast, India, Russia and Saudi Arabia gave Wales some of its lowest rankings across a number of dimensions, mirroring the lower scores observed for these countries and reflecting more limited favourability or familiarity.

Table 9: 2025 Nation Brands Index, dimension ranks for Wales by country

	Exports	Governance	Culture	People	Tourism	Immigration/Investment
Total	**28**	**21**	**28**	**25**	**28**	**22**
Argentina	32	24	30	27	29	23
Australia	26	18	25	16	20	19
Brazil	28	22	29	30	26	23
Canada	27	19	28	19	22	18
China	32	33	36	32	32	31
France	27	21	25	23	27	21
Germany	26	21	28	23	27	22
India	43	41	39	36	37	35
Italy	26	18	21	17	22	21
Japan	23	22	25	25	28	21
Mexico	33	25	36	32	31	28
Poland	29	24	26	27	27	23
Russia	36	32	32	38	39	27
Saudi Arabia	39	34	39	35	40	33
South Africa	29	23	22	23	26	20
South Korea	30	27	31	29	33	28
Sweden	26	19	27	21	25	21
Türkiye	31	26	30	32	35	28
United Kingdom	17	16	12	9	14	13
United States	25	18	23	20	21	18

Source: Anholt Nation Brands Index®, 2025

4. Conclusions

In 2025, Wales participated in the Anholt Nation Brands Index® for the sixth consecutive year. The data provides a robust and comparable overview of global awareness of, and attitudes towards, Wales, based on a snapshot of views across the index's core dimensions and attributes.

Wales ranked 25th overall out of 50 countries in 2025, with an overall score of 62.7, its highest score to date, despite a slight fall in rank from 23rd in 2024. Countries that continued to rank above Wales were predominantly high-income democracies, particularly in Western Europe and North America. Wales's global position has remained broadly stable over time, shifting only modestly from 21st in 2020 to between 22nd and 25th in subsequent years. Scores have also remained relatively steady, with 2025 showing incremental improvement.

Wales achieved an above-average favourability score in 2025, with a mean rating of 4.6 on a 1.0–7.0 scale. Favourability remained strongest among English-speaking countries, particularly the United Kingdom, Australia and Canada, and continued to align closely with familiarity levels—respondents who were more familiar with Wales tended to view it more favourably. While favourability remained stable across the six-year period (ranging from 4.6 to 4.8), Wales's favourability ranking slipped slightly from 21st in 2020 to 25th in 2025, reflecting stronger improvements by other nations rather than a decline in absolute performance.

In 2025, 53% of respondents reported at least some familiarity with Wales, resulting in a familiarity ranking of 42nd out of 50 nations. Although this reflects a slight decline in score from 2024, Wales's ranking improved by two places due to relative shifts among comparator countries. As in previous years, familiarity remained highest in the United Kingdom, northern Europe and North America, and lowest in parts of Asia and Latin America.

Across the NBI's six dimensions, Wales again received generally consistent rankings in 2025, ranging from 21st to 28th place. Wales continued to rank in the top half of nations for multiple dimensions, with its strongest performance in Governance (21st), Immigration and Investment (22nd) and People (25th). Its lowest rankings in 2025 were for Exports, Culture and Tourism (all at 28th), although these remain broadly in line with longer-term patterns.

Overall, the 2025 results reinforce the long-term stability of Wales's international reputation. While there were some shifts in familiarity and rankings across individual markets, the underlying perceptions of Wales remain consistently positive, with incremental improvements in several scores and a continued strong performance relative to the global cohort. The findings highlight the importance of interpreting both scores and rankings together, as changes often reflect movements in other countries' performance rather than substantial shifts in attitudes towards Wales itself.