



## **Perception Study on the Image of Israel – November 2019**

### **Executive Summary**

Quantitative research update based on the previous Nation Brand study done in July-August 2018

#### Overview:

The main objective of this Quantitative Research study is to assess the evolution of the international perceptions of the Brand 'Israel' for Tourism, Talent, and General Reputation dimensions in each of the strategic audiences and markets, compared to the study performed between July and August 2018. The 2019 survey verifies the 2018 results and the conclusions drawn by Bloom Consulting based on the collected data. A slight increase in "ON-Brand" results occurred organically, despite a lack of strategic activity to brand Israel. However, the results show that global events (such as the 2019 Eurovision) that are not a part of a consistent messaging plan, make only short-term impact and do not linger in global public awareness. This is in contrast to "Off-Brand" messaging that appears on global media platforms regularly, and thus shapes public opinion of Israel accordingly.

#### Survey Details:

<b>Period:</b>	October 8-October 25, 2019
<b>Audiences:</b>	50.2% Gen Z; 49.8% Millennials
<b>Target markets:</b>	12
<b>No. of Surveys:</b>	3,710

Be All, Alon Tower 1,  
94 Yigal Alon Street, Tel Aviv,  
Israel 6789155

T. +972 3 648 1824  
E. team@vibeisrael.com

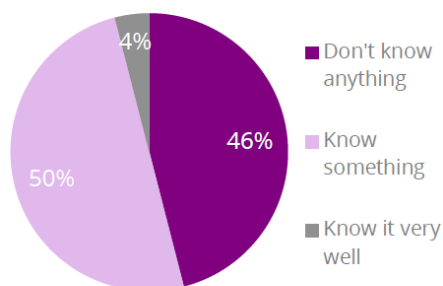
[www.vibeisrael.com](http://www.vibeisrael.com)  
[@vibeisrael](https://www.instagram.com/vibeisrael)

Key Research Findings:

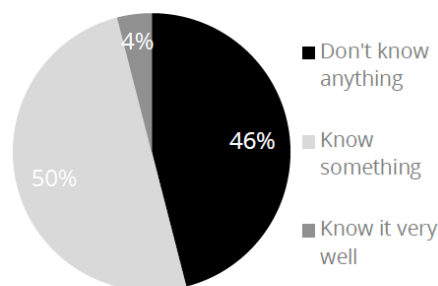
1. **Young people have limited or no knowledge of Israel:** The familiarity with Israel by Gen Z remains unchanged compared to last year: Only 4% of answered that they knew Israel well. Almost half of the audience admitted to not knowing anything about Israel.

2.5 Graph: How well respondents know Israel

Gen Z (2019)  
N= 1862

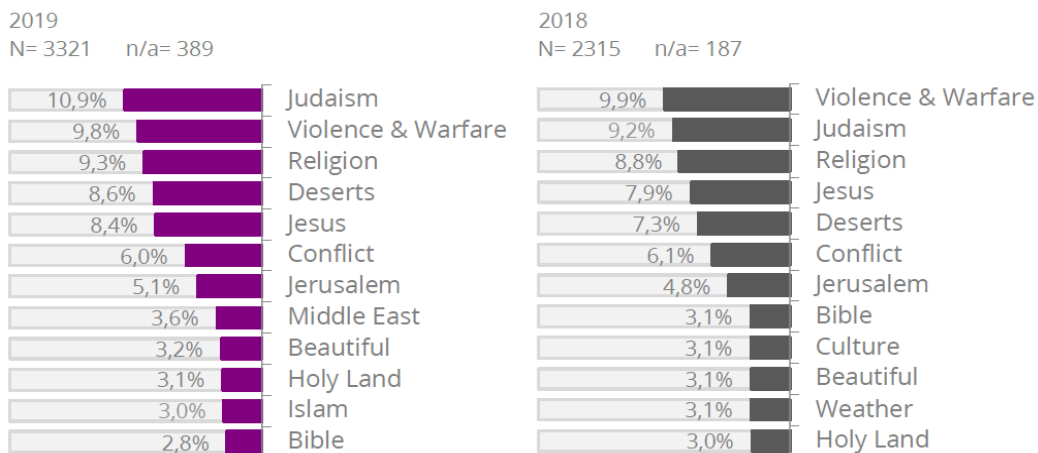


Gen Z (2018)  
N= 1272



2. **Israel's perception as a religious country is getting stronger:** When asked what image first comes to mind when you hear the word Israel, "Judaism" takes over "Violence & Warfare" as the first image associated with Israel. This confirms and strengthens the insights\* from the 2018 research regarding the rise of Israel's perception as a religious country. The Israeli-Palestinian Conflict remains stable in sixth position, confirming Bloom Consulting's previous analysis: The Conflict has become chronic.

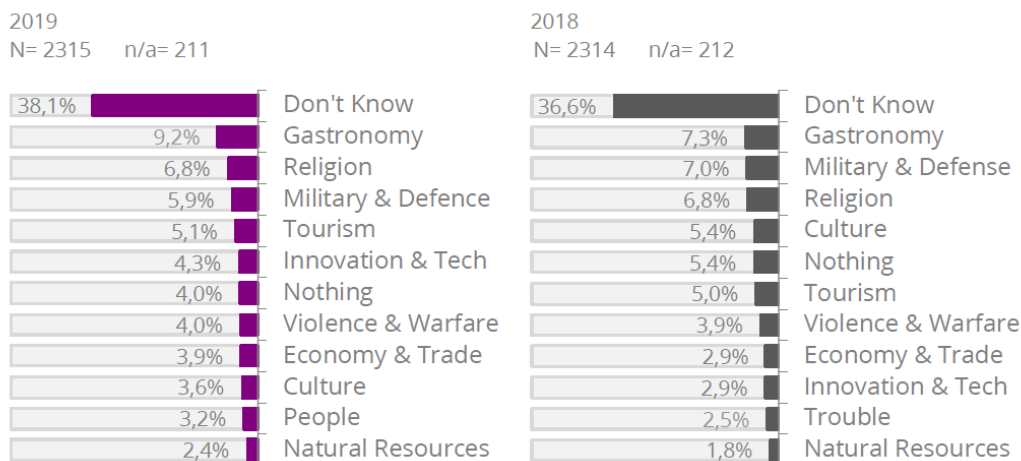
Graph 4. First image or idea about Israel - evolution.



*\*"When Israel and the Jewish Diaspora say "Jewish State", the world hears "Religious State". For most people, especially young people, religion is perceived to be closed, dogmatic, rigid, and not progressive, liberal or inclusive. This is why most young people do not feel Israel is attractive or relevant to them, regardless of the Conflict."*

- 3. Positive growth in Israel's association with Gastronomy, Tourism and Innovation:** When asked what Israel does best, 42% of respondents answered "I don't know" or "Nothing". This strengthens the 2018 conclusion that Israel has not done enough over the years to let people know what it has to offer. However, there has been a slight increase compared to 2018 in respondents linking Israel positively with Gastronomy, Tourism, and Innovation & Tech.

Graph 5. Thing Israel does best - evolution.

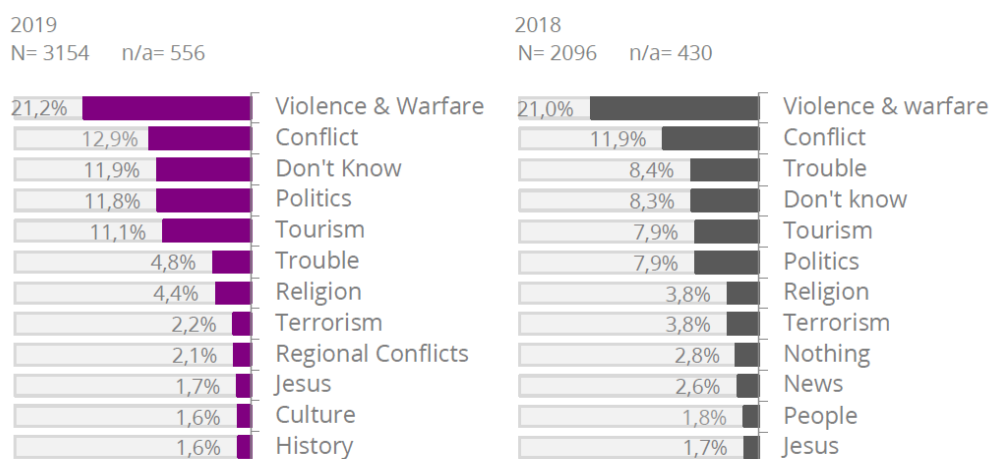


4. Most of the information young people are exposed to in the media regarding Israel is related to either religion or the Conflict (information that is "Off Brand"). However, more young people report being exposed to content regarding Israeli tourism in the media. The growth trend in Tourism can be explained through the increase of awareness of advertising campaigns promoting Israel as a touristic destination. This strengthens the conclusion that in order to create "On-Brand" awareness of Israel resources must be invested in creating a constant stream of "on Brand" content aimed at a global audience, to overshadow the stream of "Off-Brand" content that is available.

5. **BDS awareness is low and is losing recognition:** Showing no change from 2018, only 10% of the respondents from Gen Z have heard about the BDS movement. Among Millennials, results show that their awareness has slightly declined from 21% in 2018 to 18% in 2019. Moreover, this year's results confirm the past research's conclusion which is that BDS does not

have a negative effect on the perception of Israel. Only 11% of Millennials and Gen Z who have heard about the BDS have worsened their image of Israel. Surprisingly, for a quarter of the respondents of Gen Z and a third of Millennials, the BDS movement has improved their perception of Israel.

Graph 8. Type of information last heard about Israel.



For further information regarding the research and ways to get involved in the Vibe Israel Initiative and Vibe Israel's strategy for branding Israel globally, please contact Lipaz Ela, Vibe Israel's Academy Manager, at: [lipaze@vibeisrael.com](mailto:lipaze@vibeisrael.com)

Thank you!