



VisitBritain™

Foresight Issue 111

January 2013

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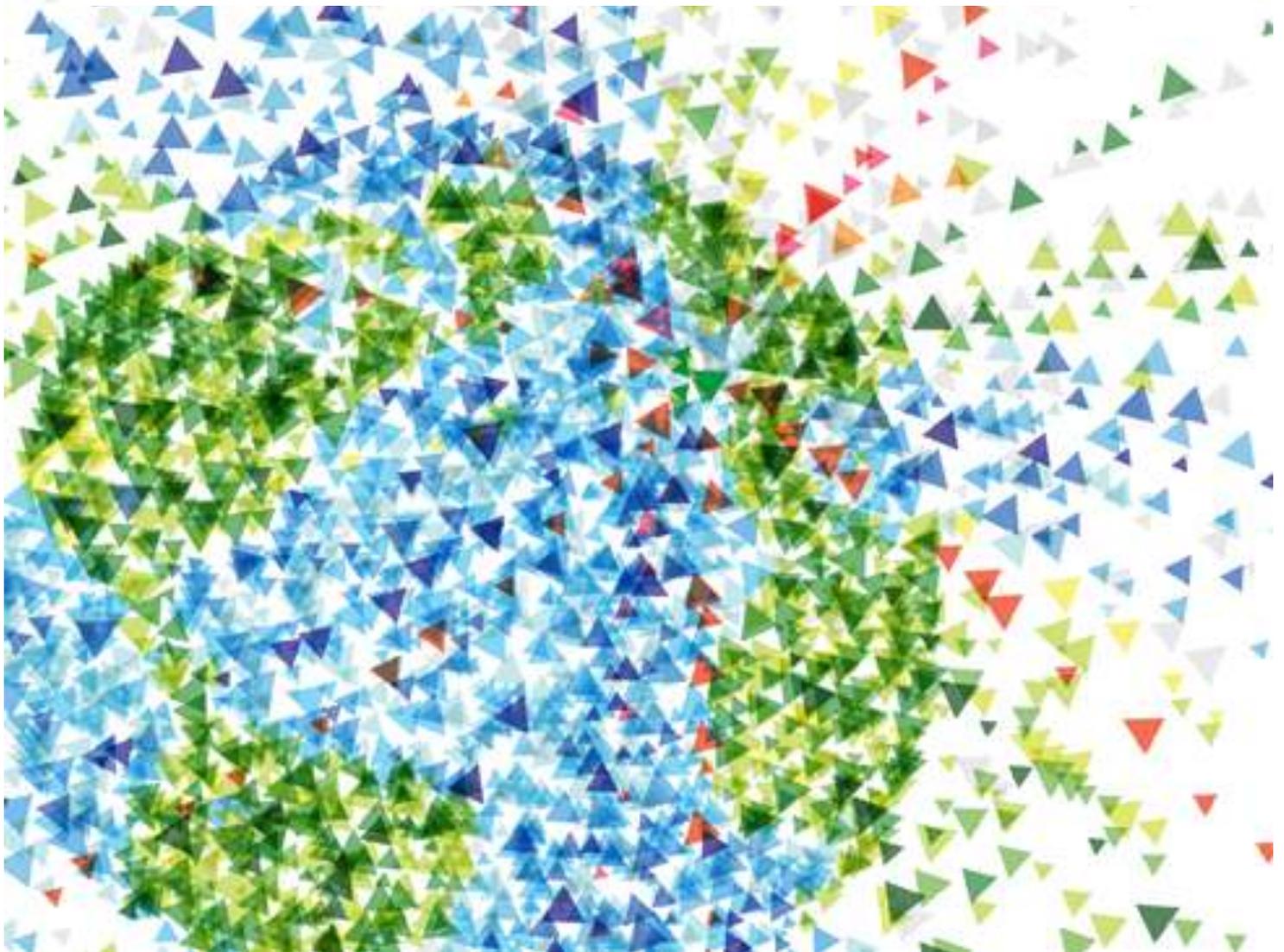


Image of Britain – Post Olympics

Summary

Following the London 2012 Olympic and Paralympic Games Britain's overall 'nation brand' improved, with Britain moving up one place to be ranked fourth out of 50 major countries around the world. As nation brands are very stable and Britain already had a very strong image (competing at the very top of the table) no dramatic changes were expected - even a small change is very positive news. These minor shifts also highlight how hard it is to change deeply held perceptions of a country.

Britain was ranked higher for culture (especially for sport) than it had been pre Games, but there were also improvements for welcome and natural scenic beauty indicating that Games coverage had influenced perceptions of Britain and the British people more widely. The highlights for Britain's image are

- Overall nation brand has moved up one place to 4th
- For Culture UK has also moved up one place to 4th
- For Tourism the UK has held at 4th, and held at 7th for aspiration to visit
- For Welcome the UK moved up 3 places to 9th

There is evidence that we have capitalised on the 2012 Games to improve Britain's image, meeting core objectives to enhance the image of Britain as a visitor destination

- Maximise the economic benefit for tourism across the country – 75% of those who saw coverage of Britain hosting the Games agreed it made them think Britain had plenty of interesting places to visit outside London
- Enhance the image of Britain as a visitor destination - 63% of those who saw coverage of Britain hosting the Games agreed it had increased their interest in visiting for a holiday (and this was notably higher in emerging markets including the BRICs)
- Deliver a world class welcome in 2012 and beyond - Britain's ranking for welcome improved by three places to place us 9th out of 50 destinations around the world, including all major competitors. Our highest ranking ever. We also know from other VisitBritain research that 99% of departing overseas visitors during July - September 2012 said they had felt welcome in Britain, with five out of six visitors (83%) 'very' or 'extremely' welcome (a statistically significant increase on 79% in Q3 2011).

How welcome visitors feel is critical, from previous research we know that 90% of those who felt very or extremely welcome are

extremely or very likely to recommend visiting Britain for a holiday to their friends or family. In some markets concerns about language barriers and welcome can be barriers to visiting Britain so feeling that you would be welcomed is a real positive.

Those in emerging markets were most likely to have seen / heard about Britain hosting the Games (up to 96% in China and 89% in Russia remembered seeing coverage up to three months after the Olympic Games had ended), and here the Games had a particularly positive impact, indicating that the greatest impact has been in markets where awareness of Britain was previously lower.

However, all those who saw coverage of the Games were more positive about Britain than those who had not, regardless of where they lived, for example almost two thirds of US respondents agreed that the coverage had increased their interest in visiting Britain, and in Germany (where outdoor activities are important when choosing a holiday) Britain's ranking for 'scenic natural beauty' improved eight places.

These findings are in agreement with the results of an international survey by ECCO which showed that London 2012 was a public relations success for Britain. Amongst over 100 communications experts from 24 countries

- 79% judged their 'local' media coverage of the London Olympics as largely positive
- 73% to have changed the image of the British for the better
- 99% that the Olympics will encourage more people from their country to visit Great Britain

Introduction

The global exposure that Britain enjoyed in 2012 provided an unprecedented opportunity for VisitBritain to ensure that the whole of the UK visitor economy benefited from the 2012 Games. It gave us a platform to promote the wider messages and interests of destination Britain, to deliver and showcase a world class welcome in 2012 and beyond, and to maximise the economic benefits of tourism across the UK.

Our mission was not just to promote the few weeks of the 2012 Olympic and Paralympic Games. It was to make full use of the opportunities to promote destination Britain before, during and after those few weeks, to reach new customers in emerging markets and to refresh our appeal in core markets.

In terms of brand building, or perceptions of Britain we wished to

capitalise on the global platform offered by the 2012 Games to accelerate the development of Britain's image.

Measuring perceptions of Britain

VisitBritain continuously tracks perceptions of Britain, via our in market overseas teams who collate media coverage of Britain and also through dedicated research projects such as the GfK Anholt 'Nations Brand Index' (NBI).

Since 2008 the Nations Brand Index has been an annual study looking at the views of people in 20 countries around the world about 50 nations, including the UK. It is a very stable measure with the overall UK rankings changing by less than one place each year.

Views are collected from people who have not necessarily visited Britain (or the other countries they are asked to rank) but of course perceptions are key to holiday destination choices. Whilst VisitBritain also monitors visitors experiences perceptions are critical in the decision making process.

Study details

The Nations Brand Index is an online survey, run by GfK in partnership with Simon Anholt, adhering to strict quality control measures.

Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender and education of the online population in that country. Additionally, in the United States, India and Brazil, race/ethnicity has been used for sample balancing. So the data reflects the views and opinions of online populations in these countries. In the standard annual NBI waves (and in the Pre Games wave discussed here), views are collected from 1,000 respondents per country so overall 20,000 people participate.

In the report below the 'Pre Games' data refers to data collected in the standard 2012 annual NBI wave in July 2012, and the 'Post Games' data to a specially commissioned wave of research in October / November 2012. Due to costs the number of panel countries (from which views are collected) in the Post Games wave was reduced from the standard 20 to 13. To allow fair comparison the Pre Games data therefore also only included data collected from these 13 markets (although more data is available). The sample size for the Pre Games wave was 13,000 (1,000 per panel country) and in the additional Post Games wave was 3,900 (300 per panel country).

The July pre Games research ended just before the Games began and the post Games research began around two months after the Games ended – this does though give us a good indication of the proportion of people who remember Britain hosting the Games.

Reach of Games influence

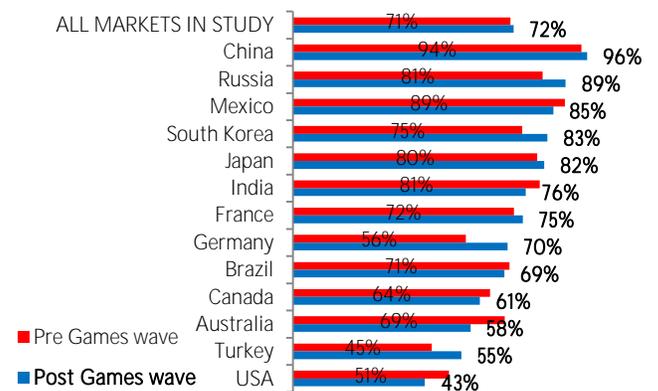
In both the pre and post Games waves of research around seven in ten (71% and 72% respectively) of respondents reported they had seen or heard about Great Britain hosting the 2012 Olympic and Paralympic Games on TV or elsewhere. If the research had been conducted during the Games this may have been higher.

Those markets included in the study most likely to have heard or seen coverage about the Games in Britain were China, Mexico, Russia, India and Japan – at least four in five people had heard about the Games before they began as shown in Chart 1.

Following the Games at least three in four remembered seeing coverage of Britain as host. Those in Turkey, the USA and Germany were least likely to have heard about the Games beforehand (around half had done so in each of these markets) but following the Games higher proportions in Turkey and Germany remembered Britain hosting them – these two markets saw the greatest increase in awareness despite low awareness pre Games.

Awareness in the USA and Australia was at its height just before the Games with recall following the Games lower – this could perhaps be linked to high profile sponsor advertising in these markets.

Chart 1 Seen / heard about GB hosting the Games on TV or elsewhere, by market



Those who had previously visited Britain, those who were generally more favourable towards Britain and those who aspired to visit Britain were a little more likely to have picked up on the coverage. Whilst this may well be simply because they were pre-disposed to pick up on coverage of Britain it also indicates that a relevant tourism audience (who are more likely to decide to visit Britain) picked up on coverage.

Men were a little more likely to have picked up on pre Games coverage than women. Older people (aged 35 or over) were more likely to have noticed than younger people. Also, those in higher income brackets, with higher wages and higher education levels

were more likely to have picked up on coverage, as were those who lived in cities (the latter may have been more exposed to billboard advertising from Olympic sponsors).

Britain's ranking

Overview

Looking at Britain's overall rankings (in Table 1 below) it is clear that the aspects which are of most importance to tourism (culture and people as well as tourism itself) are strengths for Britain in the eyes of people around the world.

In the pre Games wave Britain was ranked fourth out of 50 for tourism, and fifth for both culture and people, as shown in Table 1 below. Following the Games Britain's overall 'nation brand' rank increased one place to fourth (behind only the USA, Germany and France).

As might be expected given Team GB's excellent performance and of course the venues Britain's ranking for sport improved two places, pushing Britain's overall ranking for culture also up to fourth.

Table 1 Britain's rankings pre and post Games (out of 50 destinations)

Measure	Pre Games (July 2012)	Post Games (October / November 2012)	Change in rank
Overall Nation Brand*	5	4	+1
Tourism (overall)	4	4	
Would like to visit if money was no object	7	7	
Is rich in natural beauty	19	18	+1
Is rich in historic buildings and monuments	5	5	
Has a vibrant city life and urban attractions	4	4	
Culture (overall)	5	4	+1
Excels at sport	7	5	+2
Has a rich cultural heritage	7	7	
Is an interesting and exciting place for contemporary culture	4	4	
People (overall)	5	5	
If I visited, the people would make me feel welcome	12	9	+3

* Also includes Governance, Immigration-Investment and Exports

Tourism and Culture rankings

For further insight it is possible to drill down and see how Britain is ranked on a number of individual attributes which make up the overall rankings for each element.

This shows that within the 'tourism' element Britain was one of the most aspirational global destinations in the 'pre' wave of research, ranked seventh for 'would like to visit if money was no object', and

Britain held on to this place following the Games.

Britain has consistently had strengths in heritage (ranked fifth for historic buildings and monuments and seventh for cultural heritage) but ranked even higher for contemporary city life and culture (ranked fourth for both), a unique mix amongst competitor destinations.

Britain's ranking for natural beauty is lower, and a clear weakness compared to other stronger elements. It should certainly be borne in mind here that the majority of respondents had not visited Britain (in the pre wave fewer than one in five had visited Britain for leisure), so this perhaps indicates low awareness of Britain's natural beauty. However, post Games Britain's ranking improved one place to 18th – perhaps reflecting that respondents had seen some coverage of British countryside as well as London.

Welcome rankings

Welcome is also a key issue for tourism, but in the pre Games wave Britain was ranked at 12th. As mentioned earlier those who feel welcome are far more likely to recommend Britain, and word of mouth is an important influence when people choose holiday destinations, with personal recommendations especially important in emerging tourism markets such as China, where people may have less awareness of Britain's offer and be concerned about language difficulties. Hearing that someone you know was made to feel welcome is a real selling point.

From focus groups we know that British people are often thought to be formal and unfriendly but media coverage over the Games showed a new, fun, side. We wanted to understand if overseas visitors had felt more welcome during summer 2012.

In previous years the ranking has been similar. Very encouragingly this improved post Games to 9th, putting Britain in the top ten for the first time. This shift is notable given the relative stability of rankings between the waves (and indeed in previous years). It indicates that the images of British spectators enjoying themselves, friendly Games-makers and participants' sportsmanship have gone a long way to dispel traditional images of British reserve.

This improvement in perceptions is backed up by experiences. In other recent VisitBritain research we found that visitors during Games time received a great welcome in Britain

- 99% of departing overseas visitors during July - September 2012 said they had felt welcome in Britain, and five out of six visitors (83%) felt either 'very' or 'extremely' welcome (a statistically significant increase on 79% in Q3 2011).
- 98% of departing overseas visitors during July - September 2012 said they would be likely to recommend a holiday in Britain to friends or family, with 85% 'very' or 'extremely'

likely to recommend Britain, a slight increase on Q3 2011 when 83% reported this.

These findings are from questions VisitBritain sponsors on the Civil Aviation Authority (CAA) survey of departing passengers at five of the main UK airports (Heathrow, Gatwick, Luton, Stansted and Manchester). There were interviews with 2,088 departing overseas residents during July, August and September 2012.

Previous visitors

Amongst those who had visited Britain for a holiday ratings for all aspects were higher in both the Pre and Post Games research, notably ranking Britain higher for aspiration to visit (or in this case return) if money was no object, and also for welcome. In the Post Games wave visitors were particularly more likely to be favourable about Britain’s modern attributes (vibrant city life and contemporary culture). In both waves of research around three quarters of those who had visited Britain for leisure had done so within the last ten years, with around 40% visiting within the last three years.

Another key measure is stated ‘favourability’ towards Britain, respondents were asked to give their overall opinion about the Britain on a scale of one to seven where one is extremely unfavourable and seven is extremely favourable. In both the pre and post Games wave of research the UK’s average, or mean, score was 5.1 with just under one in five (19%) saying they were extremely favourable and a further 45% (over two in five) awarding positive scores of 5 or 6 out of 7. Again those who had visited Britain for a holiday were more positive, with almost twice the proportion of previous visitors being extremely favourable – over four in five awarding positive scores of 5-7 out of 7 (with around 30% extremely favourable awarding 7).

Those who saw coverage of the Games

Those who confirmed they had seen coverage of Britain hosting the Games were more positive about Britain when awarding scores on all attributes relating to tourism, culture or welcome. Respondents are asked the extent to which they agree the statement apply to Britain, with 1 is ‘strongly disagree’ and 7 is ‘strongly agree’.

As shown in Table 2 those who saw the Games were notably more likely to agree that Britain excels at sport but also that they would like to visit Britain if money was no object.

Those who had seen Britain hosting the Games were also more positive about Britain in terms of ‘modernity’, with scores for having vibrant cities and urban attractions notably higher as well as for contemporary culture. Britain’s unique offer combining heritage and contemporary aspects was recognised though with those who saw the Games also more likely to agree Britain is rich

in historic buildings and monuments.

Table 2 Britain’s post Games score (those who did and did not see Games coverage)

Mean score out of 7 (1=strongly disagree, 7=strongly agree)	Post Games – saw coverage	Post Games – did not see coverage
Tourism		
Would like to visit if money was no object	5.7	4.9
Is rich in natural beauty	5.1	4.7
Is rich in historic buildings and monuments	5.5	4.9
Has a vibrant city life and urban attractions	5.4	4.8
Culture		
Excels at sport	5.1	4.4
Has a rich cultural heritage	5.4	4.8
Is an interesting and exciting place for contemporary culture	5.2	4.6
People		
If I visited, the people would make me feel welcome	4.9	4.5

Differences by market

Looking at rankings for tourism and culture the majority of markets in the study rank Britain as top five on both aspects as shown in Tables 3 and 4. The Asia-Pacific markets of China, India, Australia and South Korea are particularly positive about Britain’s offer.

Highest rankings for Britain include being ranked second by the following markets

- China - overall for tourism, driven by a second place rank for vibrant city life and urban attractions
- South Korea - for most aspirational destination (the place they would like to visit if money was no object) as well as for sport
- Australia - for being rich in historic buildings and monuments
- Russia – overall for culture, driven by a second place rank for cultural heritage

Even though Britain is ranked lower for being rich in natural beauty India, China and Australia are more positive than others, especially India. The popularity of English Premier League football in South Korea and China may contribute to the high rankings from these markets for sport, whilst Australia shares many sporting ties including rugby and cricket.

As outlined above most of the markets which are more positive about Britain’s offer were more likely to report having seen coverage of the Games before they started, whilst we cannot

attribute all this positivity directly to the Games, there may be a contribution and it certainly has done no harm to Britain's reputation. Cities in India, China and Australia have also seen VisitBritain's GREAT campaign, "GREAT Britain: You're Invited" a major part of a broader Government initiative to show the world that Britain is a great place to visit, to live, to invest and to do business with.

Table 3 Britain's tourism rankings (out of 50 destinations) by market

POST GAMES	Tourism (overall)	Visit if money no object	Vibrant city life	Historic buildings / monuments	Natural beauty
China	2	5	2	5	7
India	3	3	3	6	4
Australia	3	4	4	2	11
South Korea	4	2	4	7	20
Russia	4	6	4	6	28
Canada	5	5	4	5	18
Japan	5	6	4	6	21
USA	5	7	4	6	19
Germany	8	10	7	8	19
France	8	14	5	6	35
Mexico	11	12	7	8	21
Brazil	13	12	9	12	28
Turkey	26	24	25	14	41

The other Asian market, Japan, also ranks Britain highly on 'modernity', especially for being an interesting and exciting place for contemporary culture and having a vibrant city life.

Canada and the US both rank Britain within the top five for culture and tourism. Both markets are most likely to think of Britain as leading on the contemporary angles of vibrant city life and contemporary culture, with heritage related rankings a little lower (although still top ten). Both North American markets rank Britain higher than average on natural beauty, just within the top twenty.

Major European markets France and Germany have more mixed views, Britain is ranked in the top five for culture but only in the top ten for tourism - familiarity and ease of access possibly making Britain a less aspirational destination. Again, contemporary culture and vibrant city life are the elements Britain is ranked most highly for. France ranks Britain particularly low for being rich in natural beauty.

Amongst the other emerging markets of Russia, Mexico, Brazil and Turkey Russia is by far the most positive towards to Britain, with Russians ranking Britain the sixth place they would most want to visit if money was no object. Brazil and Mexico are not quite as positive (and familiarity with Britain is lower) – however even here Britain is within the top ten for tourism and only just outside for culture with rankings for contemporary culture, vibrant city life

and sport all high. Britain is just outside the top ten places Brazilians and Mexicans would choose to visit if money was no object. Turkey is the most negative market in the study towards Britain, with all rankings notably lower than from the other markets. These four markets all rank Britain particularly low for being rich in natural beauty.

Table 4 Britain's culture rankings (out of 50 destinations) by market

POST GAMES	Culture (overall)	Contemporary culture	Cultural heritage	Sport
Russia	2	4	2	5
India	3	3	4	4
Australia	3	3	6	3
China	3	3	6	5
France	3	3	6	6
Germany	4	4	9	4
USA	4	4	9	4
South Korea	4	5	7	2
Canada	4	5	8	6
Japan	5	3	6	4
Brazil	9	6	11	9
Mexico	9	6	12	9
Turkey	24	25	13	29

Turkey is by far the most negative market towards Britain in the study, ranking Britain around half way down the league table of 50 nations for both tourism and culture, notably lower than all other markets, although heritage related elements are rated less weakly than others. If Turkey's ratings were not included Britain's overall nation brand would rise to 3rd (from 4th), as would Britain's ranking for culture. Whilst overall tourism would remain at 4th Britain would move up one place to 6th most wanted to visit if money was no object.

Table 5 Britain's welcome rankings (out of 50 destinations) by market

POST GAMES	Welcome
Australia	5
Canada	5
USA	6
India	9
South Korea	10
China	16
Japan	16
Russia	17
France	18
Mexico	19
Germany	22
Brazil	24
Turkey	38

Looking at how welcome people believe they would be if they visited Britain those markets where English is a main language and have historical ties with Britain are most positive - Australia, Canada, the US and India - although Britain is still outside the top five for the latter two as shown in Table 5. Considering the general positivity towards Britain from South Korea, China and Japan it is disappointing that Britain is ranked relatively lower for welcome, possibly indicating language and / or other cultural concerns. Major markets France and Germany also only just rank Britain within the top 20.

Markets with major shifts following the Games

As might be expected several markets ranked Britain notably higher for sport following the Games, as shown in Table 6. Britain's 'sport' ranking increased by five places in Germany, India and Russia.

Table 6 Major improvements in Britain's rankings, by market

	Sport	Natural beauty	Welcome	Cultural heritage	Vibrant city life
Germany	+5	+8			
India	+5				
Mexico		+5			
South Korea			+5		
Turkey			+5		
Russia	+5	+4	+4	+4	
China		+3			+3
Japan		+3			

However, there is evidence that the coverage also influenced perceptions of aspects often weaker for Britain too, with improvements in ranking for natural beauty from Germany (up eight places from 27th to 19th), an improvement of five places in Mexico, four in Russia and three in both Japan and China.

Russians seem to have also been reminded of Britain's cultural heritage, with Britain's ranking improving four places whilst in China Britain's vibrant city life has come across, with Britain's ranking improving three places.

In terms of welcome the clearest shifts in views were from South Korea, Turkey (both increasing Britain's rank by five places) and Russia (by four places).

Associations with Britain

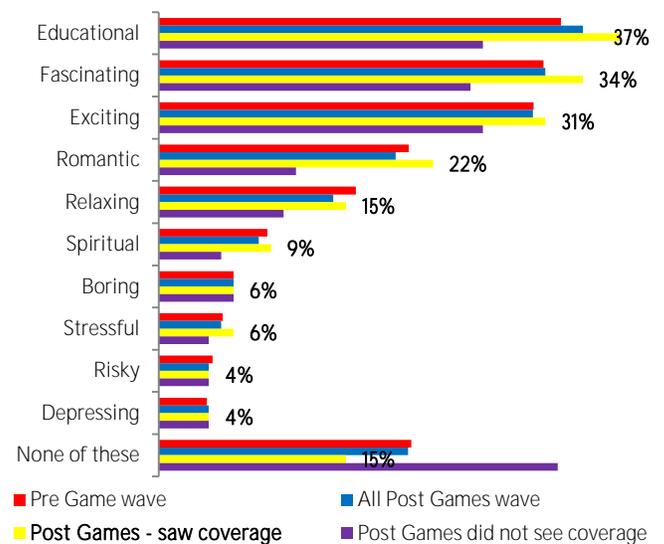
Tourism adjectives

Britain is most likely to be thought of as educational, possibly due to world class museums and galleries as well as the nation's historical high profile and literature making it being part of the

curriculum for many, as shown in Chart 2. However, almost as many think of Britain as fascinating and also a high proportion think Britain is exciting.

Those who had previously seen some coverage of Britain hosting the Games were even more positive about Britain's offer, seeming to reflect that the coverage had re-affirmed Britain's positive points. Those who had seen coverage were particularly more likely than those who had not to think of Britain as educational, romantic and fascinating – indeed twice as many of those who had seen coverage thought of Britain as romantic.

Chart 2 Perceptions of Britain's holiday offer (% associating Britain with holiday attributes pre and post Games)



In the pre Games wave around one in five did not associate Britain with any holiday attributes, possibly indicating a lack of awareness of or interest in Britain, but amongst those who had seen some coverage this dropped to just over one in seven whilst amongst those who had not seen any coverage almost one in three did not particularly associate any holiday attribute with Britain.

Those previously visited for leisure were even more likely to associate Britain with being educational, fascinating or exciting as well as being more likely to think of Britain as relaxing. It seems that visiting to some extent confirms perceptions of Britain's offer, which is of course very positive (negative attributes of boring, stressful, risky or depressing are only linked with Britain by a small minority).

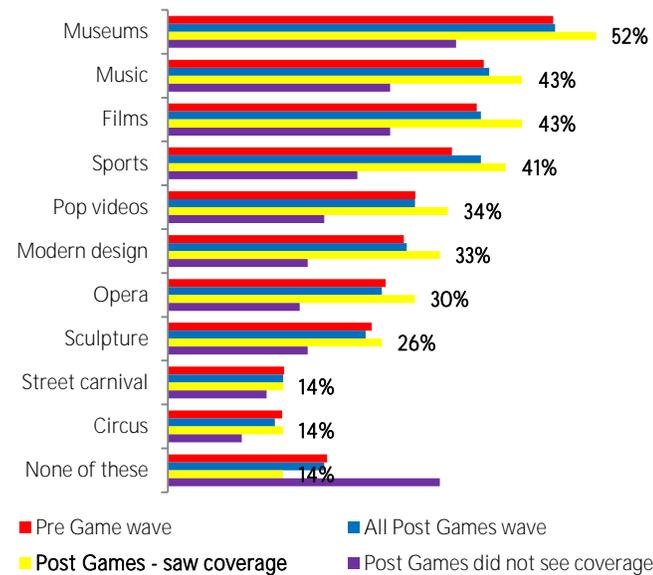
Cultural products

In terms of cultural offering Britain is most likely to be associated with museums as shown in Chart 3. High proportions also link

Britain with music, films and sport. All of these cultural products were much more likely to be associated with Britain by those who had seen the Games than those who had not.

In the pre Games wave around 20% did not associate Britain with any cultural products, possibly indicating a lack of awareness of or interest in British culture, but amongst those who had seen some coverage this dropped to 14% whilst amongst those who had not seen any coverage 33% did not particularly associate any cultural products with Britain.

Chart 3 Perceptions of Britain's cultural offer (% associating Britain with cultural products pre and post Games)



Fun

Both before and after the Games just under one in six (16%) thought of British people as fun, although those who have visited for leisure were more likely to do so (20% did compared to 15% of those who had not visited). After the Games those who had seen some coverage were slightly more likely than those who had not to think of us as fun (14% of those who had not seen coverage compared to 16% of those who had).

Reported impact of Games

Interest in visiting Britain

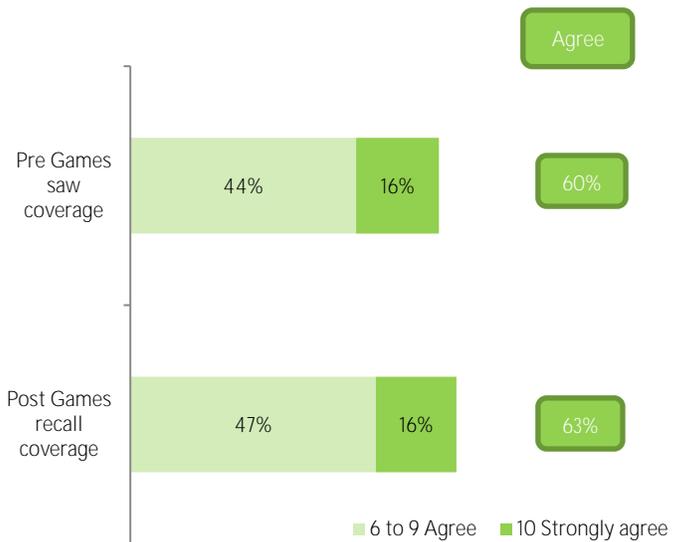
Even before the Games began the coverage overseas was encouraging people to visit. Three out of five respondents who had seen coverage (just over 70% had) agreed that what they had seen / heard about the Games so far had increased their interest in visiting Britain as shown in Chart 4. Respondents were asked

whether they agreed or disagreed on a scale of 1 to 10 where 1=strongly disagree and 10=strongly agree.

After the Games this trend continued, with a slightly higher proportion agreeing that Britain hosting the Games had increased their interest in visiting.

Not all respondents are international travellers, but as awareness of Britain as a holiday destination, and interest in visiting is generally high already (consistently ranked in top ten for aspiration to visit in NBI) this further improvement is certainly good news for Britain. Amongst those who did not think it had increased interest (around 25% Pre Games and 20% Post Games), or had made no difference (16%, 17%) there will be some for whom this is because they are already very interested in visiting Britain.

Chart 4 Extent to which agree "GB hosting the Games has increased my interest in visiting for a holiday" pre and post Games

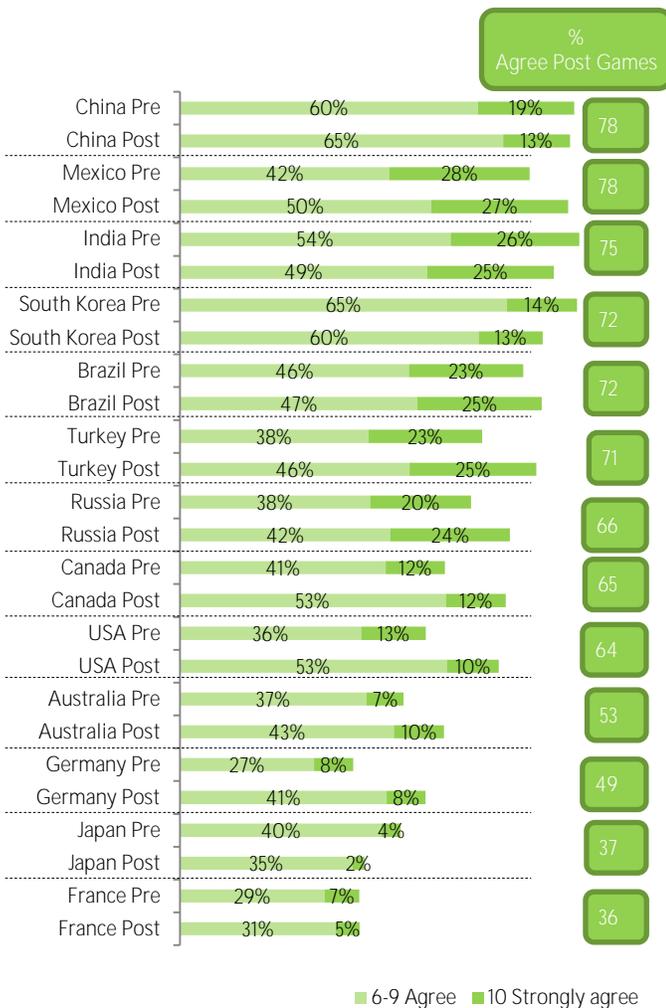


It is in the emerging markets though that the real influence is seen. India, China and South Korea were the most positive markets pre Games with at least three quarters of respondents agreeing, before the Games had begun, that the coverage they had already seen had increased their interest in visiting Britain. Following the Games between two thirds and three quarters of those who had seen the Games in China, Mexico, India, South Korea, Brazil, Turkey and Russia said it has increased their interest in visiting Britain for a holiday, as shown in Chart 5. In Mexico, India, Brazil, Turkey and Russia this included around a quarter of respondents very strongly agreeing (awarding 10 out of 10).

In established long haul markets (Canada, USA and Australia) where respondents are more likely to have visited previously and arguably are more likely to have had visiting Britain on their radar

before the Games still between half and two thirds agreed the coverage had increased their interest in visiting. Similarly in nearby France and Germany the impact was not as strong as in emerging markets, although in Germany seeing how Britain hosted the Games appears to have a marked effect, with an uplift from around one in three before the Games to around half after the Games agreeing the coverage had increased their interest in a British holiday.

Chart 5 Extent to which agree "GB hosting the Games has increased my interest in visiting for a holiday" by market



As well as recording overall impact on interest in visiting Britain level of agreement with a bank of statements covering the impact of the Games on perceptions of Britain's offer in terms of sports and event tourism, culture and food and outside London (countryside and coast) was collected, as shown in Chart 6.

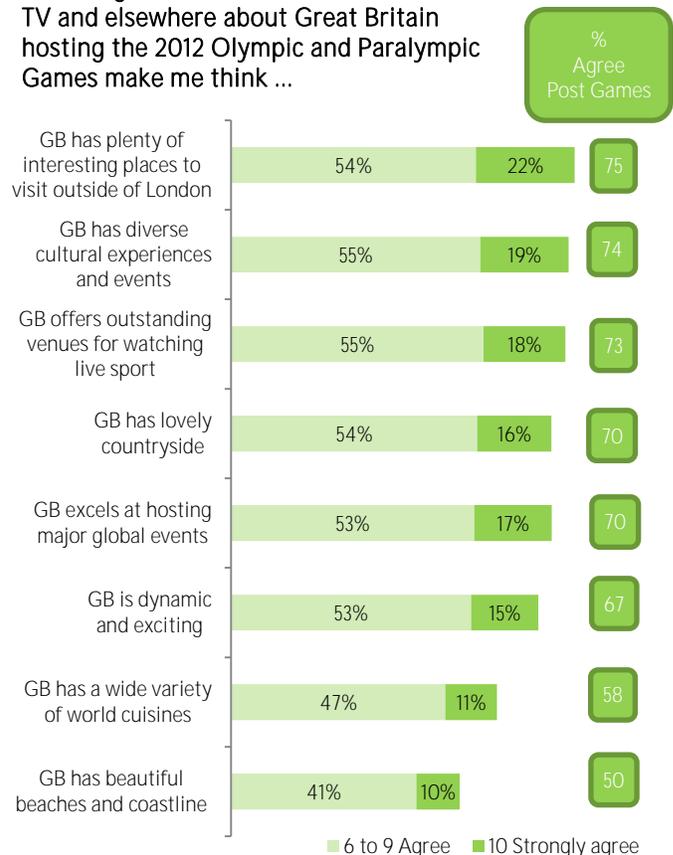
Whilst some of these aspects are not directly linked with the Games themselves VisitBritain used the platform of the Games to make 40 short films with the BBC which showcased tourism

destinations to hundreds of broadcasters, and worked with other tourism organisations within the UK who arranged scores of media trips across the whole of Britain. Over 1,000 journalists attended GREAT media events run by VisitBritain and our partner, and around 8,600 journalists received GREAT branded information at the London Media Centre. VisitBritain was also at the London & Britain Media Information Unit for accredited print and broadcast media in the Olympic Park. Overall between April and September 2012 around 24,000 pieces of media coverage were generated globally for destination Britain, worth around £2 billion.

Again, even before the Games began the coverage was prompting improvements in perceptions of Britain's offer. Before the Games respondents were most likely to agree that the coverage had made them think Britain has plenty of interesting places to visit outside London (70% agreed, with an impressive 20% reporting ten out of ten, strongly agreeing). This could perhaps reflect some coverage of the torch relay as it crossed the country, or increased general media coverage of Britain's offer. Following the Games this had increased even further with 75% of those who had seen coverage agreeing that Britain had lots of interesting places to visit outside London.

Chart 6 Extent to which agree with statements about impact of Games coverage

The things I have seen or heard on TV and elsewhere about Great Britain hosting the 2012 Olympic and Paralympic Games make me think ...



Following the Games around three quarters of respondents agreed the coverage showed Britain offers outstanding venues for watching live sport, and 70% that Britain excels at hosting major global events. Overseas media reports certainly indicated that Britain was overwhelmingly thought to have done a great job as host.

Positively for tourism perceptions of Britain's wider offer were also improved by the Games coverage with three quarters agreeing it showed Britain has diverse cultural experiences and events - possibly indicating pick up on the Cultural Olympiad. Over two thirds (67%) also agreed that the coverage they had seen had made Britain seem dynamic and exciting – perhaps complementing some traditional images of Britain as educational.

Even before the Games people overseas were picking up on Britain's scenery, and after the Games 70% agreed the coverage showed Britain had lovely countryside whilst 50% agreed it has shown Britain has beautiful beaches and coastline. Given much coverage was of course London focussed this could reflect venues outside the capital or wider media coverage of Britain as a whole during Games time. This is particularly encouraging as low awareness of Britain's natural beauty is a competitive weakness (as mentioned above).

In previous research food often emerges as a weakness in people's perceptions of Britain's offer, for emerging Asian markets this is

sometimes linked with concerns about being able to find particular food but even here the wider coverage of Britain appears to have improved perceptions for the majority, with 58% agreeing Britain has a wide variety of world cuisines.

Further information and research

VisitBritain will continue to track perceptions of Britain through the GfK Anholt Nations Brand Index, as well as in cities running the VisitBritain GREAT advertising campaign.

For more detail on the topics raised in this report, or findings from earlier waves see previous editions of Foresight:

- [Welcome](#) (August 2012)
- [Perceptions of Britain in European markets](#) not covered by NBI (June 2012)
- [Tourism Attributes](#) (December 2011)
- [2011 Nations Brand Index](#) (October 2011)

Also [VisitBritain Games Time Achievements](#) and [VisitBritain Olympic Strategy](#)

[ECCO research](#) (PR experts view of Games coverage)



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