

Perceptions and knowledge of Britain and its competitors in 2016

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Introduction

- This report is a summary of key findings from a sponsored question in the Anholt-GfK Nation Brands Index survey, conducted in July 2016, and the Decisions & Influences project, conducted by VisitBritain and Ipsos in spring in the same year. The studies both surveyed a mix of previous visitors to Britain as well as those who have not visited; both were online surveys.
- In this report we firstly explore **perceptions of Britain and its competitors** France, Germany, Ireland, Spain and Sweden as holiday destinations. Key **areas of strength and weakness** are identified according to the perceptions of the survey respondents; the reports shows which destinations come out as the **favourites by source market** when looking at the attributes surveyed.
- The following section of the report shows which destinations have been considered as **alternatives to Britain** among those who have recently visited Britain for a holiday.
- The last section identifies the **levels of knowledge** respondents hold **of Britain as a holiday destination** by source market and contrasts them to their knowledge of competitor destinations.

Study details

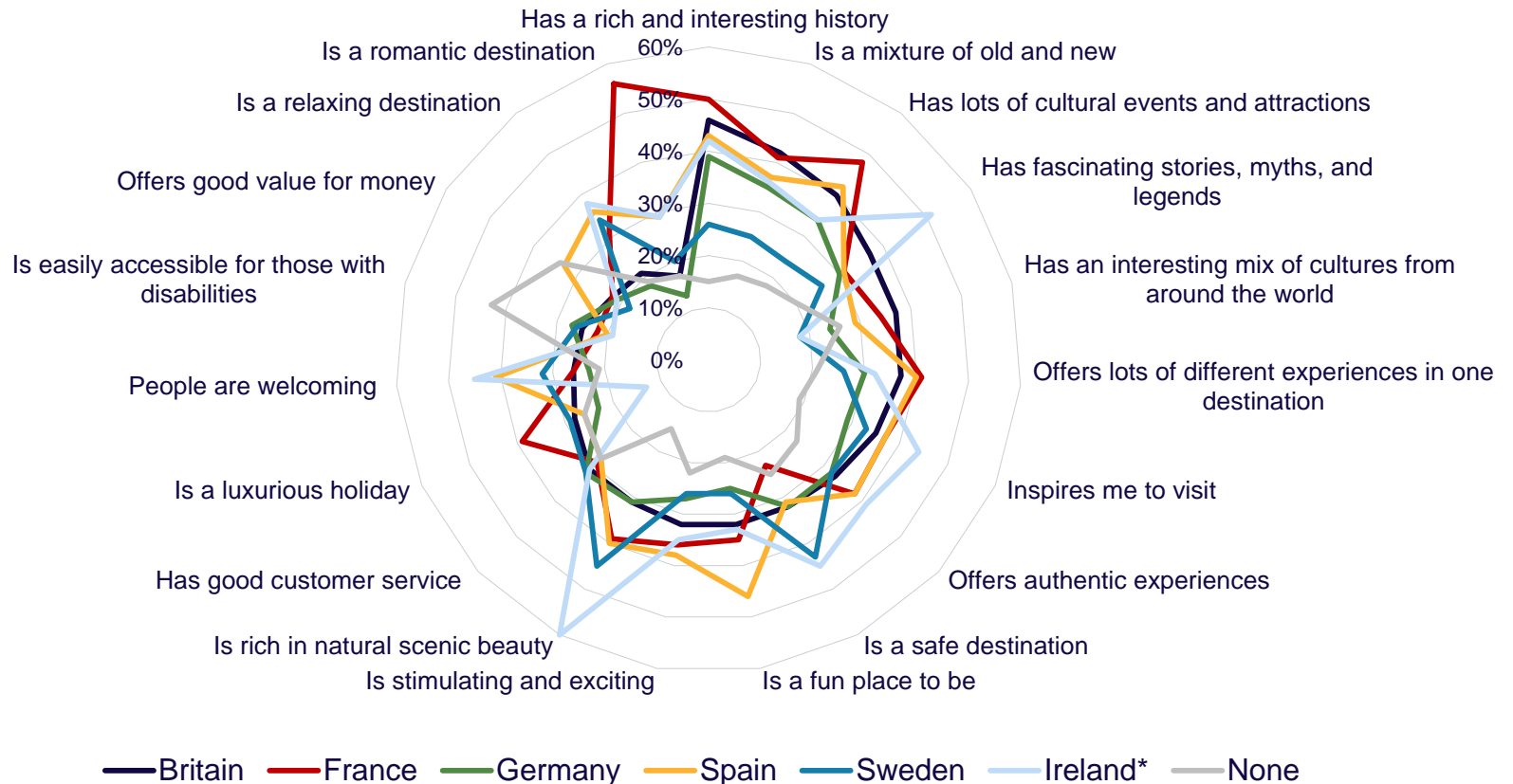
- The **Anholt-GfK Nations Brand Index** is an annual study amongst 20,000 consumers in 20 panel countries around the world. Respondents score 50 nations (including the UK) on a raft of attributes including some relating to tourism, culture and welcome as well as those relating to exports, governance and immigration / investment. Respondents are representative of the online population in each market, and they are not necessarily international travellers, so for many their views are based on perceptions not experiences. The insights used in this report come from a question sponsored by VisitBritain about respondents' perceptions of Britain and its competitors France, Germany, Spain, Sweden and Ireland as holiday destinations.
- The **Decisions & Influences project** is a research study carried out by VisitBritain and research agency Ipsos in spring 2016. International travellers from 20 different markets were interviewed, and are either previous visitors to Britain, or have not visited but would consider visiting in the future. International travellers who were residents of the following markets were surveyed: Australia, Brazil, Canada, China, Denmark, France, Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, Saudi Arabia, South Korea, Spain, Sweden, UAE & USA. The competitive set presented to respondents from each market varied depending on the respondent's country of residence.



Headline findings

Holiday destination perceptions at a glance

% agreement, by destination



“We would like you to think about France, Britain, Sweden, Germany, Spain [and Ireland where applicable] as holiday destinations. Please read each of the following statements and select which destination or destinations you think each statement applies to.” Ireland was only included for British, French, German and Swedish respondents so that they did not answer about their own country.

Source: GfK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

Headline summary

Perceptions of Britain and competitors

- Out of all the attributes surveyed, Britain leads in the competitive set for being a mixture of old and new and for having an interesting mix of cultures from around the world. Britain ranked second for its fascinating stories, myths, and legends and for having a rich and interesting history. It came out third for having lots of cultural events and attractions and offering lots of different experiences in one destination.
- Generally speaking, Ireland, France and Spain achieved the highest scores of agreement with the positive statements given about destinations.
- On the attributes included, Britain was the overall favourite for Australian respondents and popular also with Canadian, Swedish, American and Mexican respondents.
- Britain shows the widest gap between perceptions of previous holiday visitors and non-visitors which suggests that it can positively surprise visitors on many aspects.

Britain and alternative destinations

- Amongst Europeans there is a relatively high proportion, especially from Germany, Sweden and the Netherlands, who only considered Britain as the destination for their trip. The share of these is generally smaller amongst non-European respondents but still significant amongst those from New Zealand and Australia.
- In Europe, the destinations that were most likely to be considered as the alternative to Britain, were France, then Spain and Ireland. Ireland was most likely to be considered among French, Spanish and German respondents.
- Amongst non-European respondents the picture was more varied but the countries most likely to be considered as an alternative to Britain were France, Germany, Ireland, Italy, Spain and Italy.

Headline summary (cont.)

Knowledge of Britain and competitors

- Knowledge of Britain is of either medium or high level for most of the respondents who would consider Britain for a holiday but have not yet been to the destination. This finding suggests that they feel they have a good idea of what to expect from a holiday in Britain.
- Knowledge is fairly evenly spread across age groups and gender and those with higher income tend to have a higher propensity to state that they have high knowledge of Britain than respondents from the other income brackets.
- More than half of Indian, Russian, American and Australian respondents as well as half of the respondents from New Zealand stated high knowledge of Britain as a holiday destination. Generally speaking, in long haul markets there was strong knowledge on Britain compared to the average knowledge of the set of competitor destinations, with the exception of Brazil.
- Knowledge levels in the short haul markets show that most have similar knowledge of Britain and the competitor set. Spain and Italy stand out as having a higher level of knowledge of Britain compared to other destinations.
- Britain shares first spot with the U.S. in terms of high knowledge overall, ahead of France. Italy and Spain rank in joint third spot with one in three respondents overall stating high knowledge. Germany follows with 27% and Ireland comes last out of the set.
- This suggests that lack of perceived knowledge of Britain overall is not a competitive disadvantage; many travellers know – or at least think they know – what to expect. Indeed, over-familiarity with Britain might be a challenge.



Perceptions of Britain and competitors as a holiday destination

Top 10 holiday perceptions, by destination

“We would like you to think about France, Britain, Sweden, Germany, Spain [*and Ireland where applicable* *] as holiday destinations. Please read each of the following statements and select which destination or destinations you think each statement applies to.” (% indicates proportion of respondents agreeing that each statement applies to that destination)

France		Britain		Sweden	
Is a romantic destination	56%	Has a rich and interesting history	46%	Is rich in natural scenic beauty	45%
Has a rich and interesting history	50%	Is a mixture of old and new	42%	Is a safe destination	43%
Has lots of cultural events and attractions	48%	Has lots of cultural events and attractions	40%	Is a relaxing destination	34%
Is a mixture of old and new	41%	Has fascinating stories, myths, and legends	37%	Inspires me to visit	33%
Offers lots of different experiences in one destination	41%	Has an interesting mix of cultures from around the world	37%	People are welcoming	32%
Is a luxurious holiday	39%	Offers lots of different experiences in one destination	37%	Offers authentic experiences	32%
Is rich in natural scenic beauty	39%	Inspires me to visit	35%	Has good customer service	32%
Offers authentic experiences	38%	Offers authentic experiences	33%	Is a luxurious holiday	29%
Inspires me to visit	37%	Is a safe destination	32%	Offers lots of different experiences in one destination	26%
Is stimulating and exciting	36%	Is a fun place to be	32%	Is easily accessible for those with disabilities	26%

Germany		Spain		Ireland*	
Has a rich and interesting history	39%	Is a fun place to be	46%	Is rich in natural scenic beauty	60%
Is a mixture of old and new	35%	Has a rich and interesting history	43%	Has fascinating stories, myths, and legends	51%
Has lots of cultural events and attractions	34%	Has lots of cultural events and attractions	42%	Is a safe destination	45%
Is a safe destination	32%	People are welcoming	41%	People are welcoming	45%
Offers authentic experiences	32%	Offers lots of different experiences in one destination	40%	Inspires me to visit	44%
Has good customer service	32%	Is rich in natural scenic beauty	40%	Has a rich and interesting history	42%
Is rich in natural scenic beauty	31%	Is stimulating and exciting	38%	Offers authentic experiences	41%
Offers lots of different experiences in one destination	30%	Offers authentic experiences	38%	Is a relaxing destination	38%
Has fascinating stories, myths, and legends	30%	Inspires me to visit	37%	Is a mixture of old and new	36%
Inspires me to visit	29%	Is a mixture of old and new	37%	Is stimulating and exciting	35%

*Ireland was only included for British, French, German and Swedish respondents so that they did not answer about their own country

Source: GfK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

Holiday destination perceptions

“We would like you to think about France, Britain, Sweden, Germany, Spain [*and Ireland where applicable*] as holiday destinations. Please read each of the following statements and select which destination or destinations you think each statement applies to.” (% indicates proportion of respondents agreeing that each statement applies to that destination)

Average agreement	Britain	France	Germany	Spain	Sweden	Ireland*	None
Has a rich and interesting history	46%	50%	39%	43%	26%	42%	15%
Is a mixture of old and new	42%	41%	35%	37%	25%	36%	17%
Has lots of cultural events and attractions	40%	48%	34%	42%	24%	34%	18%
Has fascinating stories, myths, and legends	37%	31%	30%	31%	26%	51%	20%
Has an interesting mix of cultures from around the world	37%	34%	24%	29%	18%	18%	26%
Offers lots of different experiences in one destination	37%	41%	30%	40%	26%	32%	21%
Inspires me to visit	35%	37%	29%	37%	33%	44%	19%
Offers authentic experiences	33%	38%	32%	38%	32%	41%	23%
Is a safe destination	32%	23%	32%	31%	43%	45%	25%
Is a fun place to be	32%	35%	25%	46%	26%	33%	19%
Is stimulating and exciting	32%	36%	27%	38%	26%	35%	22%
Is rich in natural scenic beauty	31%	39%	31%	40%	45%	60%	15%
Has good customer service	31%	29%	32%	28%	32%	31%	28%
Is a luxurious holiday	28%	39%	23%	26%	29%	13%	26%
People are welcoming	26%	26%	23%	41%	32%	45%	21%
Is easily accessible for those with disabilities	25%	22%	27%	20%	26%	19%	43%
Offers good value for money	22%	22%	21%	33%	18%	21%	34%
Is a relaxing destination	21%	31%	18%	36%	34%	38%	19%
Is a romantic destination	17%	56%	13%	29%	20%	29%	17%

*Ireland was only included for British, French, German and Swedish respondents so that they did not answer about their own country

Source: GfK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

Holiday destination perceptions overall

Britain's strengths:

(Britain's rank out of the competitive set tested in this sponsored question is indicated in brackets.)

- Britain is a mixture of old and new. (1)
- Britain has an interesting mix of cultures from around the world. (1)
- Britain has fascinating stories, myths, and legends. (2)
- Britain has a rich and interesting history. (2)
- Britain has lots of cultural events and attractions. (3)
- Britain offers lots of different experiences in one destination. (3)

What are the destination attributes that drive someone to be inspired to visit Britain? Those who say Britain inspires them to visit were most likely to do so if they felt Britain is a fun place to be, stimulating and exciting, a romantic destination and offers authentic experiences.

Competitors:

- In general, France, Ireland and Spain came out as triggering the strongest agreement with the statements given, with France leading on five attributes and Ireland seven.
- France was the strongest competitor followed by Spain for the offer of a diversity of experiences in one destination. France led on having 'a rich and interesting history' and a variety of 'cultural events and attractions'. Ireland was seen as the richest in natural scenic beauty as well as having 'fascinating stories, myths, and legends' and most inspiring to visit.

Holiday destination perceptions overall

Competitors:

- Ireland, followed by Spain and France, was the most likely to be judged to offer authentic experiences.
- The Irish and Spanish are perceived as the most welcoming followed by Swedes, with Britain on par with France.
- France is perceived to be by far the most romantic destination. France also led on perceptions of offering a luxurious holiday by some distance.
- Spain is perceived as providing best value for money out of the competitive set. Britain is on par with Ireland, France and Germany and ahead of Sweden.
- Ireland, Spain and Sweden were seen as the most relaxing destinations.
- Ireland and Sweden were seen as the safest destinations but Britain, Germany and Spain all achieved similar scores with around a third of respondents agreeing that they are safe destinations.* France is seen as a safe destination by a lower proportion, which is likely to be a consequence of several security incidents.
- Comparing the pattern of responses for all attributes across the six destinations, Britain's overall holiday brand is closest to Germany's.

*This research was carried out in July 2016 and consequently does not take into account any attacks which have occurred since then.

Perceptions of Britain by gender

In general, the views voiced by men and women were quite well balanced on most attributes.

Exceptions are that a larger proportion of men than women agreed that Britain has fascinating stories, myths, and legends, is a safe destination, and is easily accessible for those with disabilities.



Agreement levels for Britain-only	Men	Women
Has a rich and interesting history	47%	45%
Is a mixture of old and new	43%	41%
Has lots of cultural events and attractions	40%	40%
Has fascinating stories, myths, and legends	39%	35%
Has an interesting mix of cultures from around the world	37%	36%
Offers lots of different experiences in one destination	36%	37%
Inspires me to visit	34%	36%
Offers authentic experiences	34%	32%
Is a safe destination	35%	30%
Is a fun place to be	32%	33%
Is stimulating and exciting	30%	33%
Is rich in natural scenic beauty	31%	32%
Has good customer service	32%	30%
Is a luxurious holiday	28%	27%
People are welcoming	26%	26%
Is easily accessible for those with disabilities	27%	23%
Offers good value for money	23%	21%
Is a relaxing destination	22%	21%
Is a romantic destination	17%	17%

Perceptions of Britain by age

Agreement with some of the attributes varies across age groups:

- **Older age groups** are more likely to agree that: Britain has rich and interesting history, is a mixture of old and new, has fascinating stories, myths and legends, has an interesting mix of cultures from around the world, and that the people are welcoming.
- **Younger age groups** are more likely to agree that: Britain is inspiring them to visit, a fun place to be, as well as stimulating and exciting, a luxurious holiday but also offers good value for money in comparison to their older counterparts. The youngest are most likely to think it is a relaxing and romantic destination.

Agreement levels for Britain	18-24	25-34	35-44	45-54	55-64	65+	All ages
Has a rich and interesting history	42%	42%	44%	48%	51%	50%	46%
Is a mixture of old and new	37%	37%	41%	43%	47%	47%	42%
Has lots of cultural events and attractions	39%	36%	38%	42%	41%	42%	40%
Has fascinating stories, myths, and legends	33%	33%	37%	41%	40%	38%	37%
Has an interesting mix of cultures from around the world	36%	35%	36%	36%	38%	40%	37%
Offers lots of different experiences in one destination	35%	34%	37%	36%	37%	39%	37%
Inspires me to visit	39%	35%	35%	35%	32%	30%	35%
Offers authentic experiences	33%	32%	32%	35%	33%	33%	33%
Is a safe destination	34%	32%	32%	31%	32%	31%	32%
Is a fun place to be	38%	32%	32%	32%	29%	26%	32%
Is stimulating and exciting	37%	32%	30%	31%	29%	24%	32%
Is rich in natural scenic beauty	31%	29%	30%	31%	33%	34%	31%
Has good customer service	31%	30%	30%	31%	32%	30%	31%
Is a luxurious holiday	29%	28%	28%	27%	27%	22%	28%
People are welcoming	25%	24%	24%	25%	28%	27%	26%
Is easily accessible for those with disabilities	26%	25%	25%	26%	24%	27%	25%
Offers good value for money	27%	22%	21%	19%	21%	20%	22%
Is a relaxing destination	25%	22%	21%	20%	20%	19%	21%
Is a romantic destination	20%	19%	18%	15%	13%	12%	17%

Visitor vs. non-visitor perceptions of Britain

Visitors of Britain hold better perceptions of Britain than non-visitors. On all attributes surveyed respondents who have visited Britain for a holiday showed a higher level of agreement with the statements than people who had not been to Britain before. The gap in perceptions of visitors' and non-visitors' agreement was >10% on 13 attributes and more strikingly >15% on 6 of the attributes:

- Britain is a fun place to be
- Britain has lots of cultural events and attractions
- Britain is stimulating and exciting
- Britain inspires me to visit
- In Britain, people are welcoming
- Britain offers lots of different experiences in one destination

The perception gap (the gap between the perceptions of visitors and non-visitors) was strongest for Britain as a holiday destination, followed by Sweden. The gap was smaller for Germany and France, which indicates that respondents' views might be closer to the actual experience. This large perception gap suggests that Britain can positively surprise visitors on many aspects.

Agreement levels for Britain	Visited for holiday	Have not visited
Has a rich and interesting history	54%	43%
Has lots of cultural events and attractions	53%	36%
Is a mixture of old and new	53%	39%
Offers lots of different experiences in one destination	48%	33%
Has an interesting mix of cultures from around the world	48%	33%
Inspires me to visit	47%	31%
Is a fun place to be	45%	28%
Has fascinating stories, myths, and legends	45%	35%
Is stimulating and exciting	44%	28%
Offers authentic experiences	43%	30%
Is a safe destination	41%	28%
Has good customer service	40%	28%
People are welcoming	38%	22%
Is rich in natural scenic beauty	37%	29%
Is easily accessible for those with disabilities	30%	24%
Is a luxurious holiday	30%	27%
Is a relaxing destination	27%	19%
Offers good value for money	26%	21%
Is a romantic destination	22%	15%

Perceptions of Britain by market

Views of Britain were, generally speaking, most favourable amongst Australian, Canadian, Swedish, Mexican and American respondents

Agreement levels for Britain only	Argentina	Australia	Brazil	Canada	France	Germany	Italy	Japan	Mexico	Poland	South Korea	Sweden	United States	Global
Has a rich and interesting history	46%	60%	39%	60%	40%	51%	45%	42%	41%	40%	36%	48%	49%	46%
Is a mixture of old and new	41%	59%	39%	54%	34%	44%	39%	37%	41%	31%	32%	47%	46%	42%
Has lots of cultural events and attractions	37%	50%	33%	50%	38%	43%	43%	27%	37%	32%	34%	50%	43%	40%
Has fascinating stories, myths, and legends	42%	47%	37%	50%	30%	33%	41%	27%	42%	29%	26%	38%	41%	37%
Has an interesting mix of cultures from around the world	29%	53%	28%	44%	32%	38%	44%	26%	39%	39%	28%	37%	39%	37%
Offers lots of different experiences in one destination	34%	51%	36%	47%	29%	39%	36%	29%	38%	25%	24%	47%	40%	37%
Inspires me to visit	31%	38%	33%	42%	36%	32%	38%	37%	39%	17%	31%	44%	33%	35%
Offers authentic experiences	30%	45%	32%	49%	22%	36%	33%	28%	37%	21%	24%	36%	41%	33%
Is a safe destination	27%	37%	34%	45%	40%	37%	24%	18%	36%	21%	24%	44%	34%	32%
Is a fun place to be	21%	44%	28%	41%	34%	35%	29%	28%	31%	26%	21%	47%	35%	32%
Is stimulating and exciting	34%	43%	31%	39%	28%	35%	32%	16%	39%	17%	19%	42%	34%	32%
Is rich in natural scenic beauty	32%	43%	31%	42%	20%	32%	32%	22%	39%	24%	21%	31%	39%	31%
Has good customer service	29%	35%	34%	37%	27%	28%	31%	18%	36%	35%	26%	40%	29%	31%
Is a luxurious holiday	39%	31%	30%	32%	19%	16%	29%	26%	41%	22%	26%	22%	25%	28%
People are welcoming	14%	45%	17%	38%	24%	26%	16%	19%	22%	19%	18%	39%	36%	26%
Is easily accessible for those with disabilities	23%	35%	30%	30%	24%	19%	24%	10%	33%	25%	26%	22%	25%	25%
Offers good value for money	30%	25%	17%	21%	14%	15%	12%	16%	34%	17%	29%	28%	24%	22%
Is a relaxing destination	19%	28%	23%	27%	17%	24%	18%	18%	18%	15%	20%	23%	26%	21%
Is a romantic destination	13%	16%	17%	17%	15%	15%	14%	24%	18%	11%	22%	15%	20%	17%

Please note that response patterns in international surveys tend to vary by market in general e.g. Japanese respondents can display below average levels of agreement.

Source: GFK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

Favourite destinations by source market

Looking at the average scores across all the six holiday destination attributes surveyed by 13 source markets to assess each destination's overall brand strength, the following can be noted:

- France achieved the highest scores, on average, out of these destinations and resulted as the highest-rated for Canadian, Mexican, Brazilian and South Korean respondents.
- Britain was the top-rated destination for Australian respondents, and joint highest (along with France) for American respondents.
- Spain was the favourite for Argentinians, French, Italian, Polish and Swedish respondents.
- Ireland (only included in the set in 4 source markets) was the favourite for German and British respondents.
- Germany and Sweden have not scored highest out of the destinations in any of the source markets.
- Japanese respondents gave lower scores for the attributes covered in the survey.

Average agreement	Argentina	Australia	Brazil	Canada	France	Germany	Italy	Japan	Mexico	Poland	South Korea	Sweden	UK	US
Britain	30%	41%	30%	40%	28%	31%	31%	25%	35%	24%	26%	37%		35%
France	39%	39%	40%	44%		35%	30%	26%	44%	31%	32%	37%	31%	35%
Germany	30%	33%	32%	34%	24%		21%	22%	33%	20%	24%	29%	27%	31%
Spain	40%	34%	37%	41%	37%	36%	36%	21%	36%	43%	26%	38%	34%	34%
Sweden	28%	34%	28%	35%	28%	36%	26%	21%	28%	24%	24%		28%	32%
Ireland*					36%	37%						32%	35%	
None	15%	22%	14%	21%	25%	24%	19%	44%	9%	20%	25%	24%	25%	29%

*Ireland was only included for British, French, German and Swedish respondents so that they did not answer about their own country

Please note that response patterns in international surveys tend to vary in general by market e.g. Japanese respondents can display below average levels of agreement.

Source: GfK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

Perceptions summary

Key takeouts:

- Out of all these attributes, **Britain's strengths** lie in the following areas:
 - **Britain leads on:** Britain is a mixture of old and new and Britain has an interesting mix of cultures from around the world.
 - **Britain ranks second for:** Britain has fascinating stories, myths and legends and a rich and interesting history.
 - **Britain ranks third for:** Britain has lots of cultural events and attractions and lots of different experiences in one destination.
- With the exception of those that Britain leads on as mentioned above, on all other attributes at least one of the competitors has achieved a higher score of agreement. In general, **France, Spain** and **Ireland** came out at as triggering the strongest agreement with the statements given.
- **Britain** shows the widest gap between perceptions of visitors for a holiday and non-visitors which suggests that it **can positively surprise visitors** on many aspects.
- On the attributes included, Britain was the **leading destination** overall for **Australian respondents** and **joint-highest for Americans**, and also scored well with **Canadian, Swedish** and **Mexican** respondents.
- **France** achieved the highest average levels of agreement when looking at all attributes combined and was the favourite for Canadian, Mexican and Brazilian survey participants.



Competitors considered as
an alternative to Britain

Competitors – European markets

“When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?”

- France is the most considered alternative destination amongst the respondents in Europe, followed by Ireland and Spain.
- A large proportion of European respondents, especially from Germany, Sweden and the Netherlands, have not considered an alternative destination to Britain.

France		Germany		Italy		Netherlands	
Ireland	41%	Britain only	44%	France	35%	Britain only	36%
Spain	30%	Ireland	25%	Spain	24%	France	30%
Britain only	25%	France	18%	Netherlands	23%	Spain	23%
Germany	23%	Spain	15%	Britain only	23%	Ireland	18%
Italy	20%	Netherlands	13%	Germany	17%	Germany	12%
Netherlands	16%	Italy	9%	Austria	13%	Italy	9%
US	16%	Austria	8%	US	10%	Belgium	7%
Switzerland	14%	Another country	8%	Another country	8%	Another country	7%
Another country	11%	Switzerland	6%	Switzerland	3%	Austria	3%
Austria	9%	Poland	3%				

Russia		Spain		Sweden	
France	40%	France	39%	Britain only	43%
Germany	37%	Ireland	30%	France	26%
Switzerland	28%	Germany	24%	Germany	15%
Spain	24%	Britain only	24%	Italy	11%
Italy	23%	Italy	17%	Norway	11%
Britain only	18%	US	16%	Ireland	11%
Austria	16%	Portugal	9%	Another country	4%
US	14%	Another country	5%		
Another country	5%	Morocco	4%		

Competitors – non-European markets

“When you chose to visit Britain on holiday, did you consider any of the below countries as an alternative destination for that trip?”

- France is the most considered alternative destination amongst the International respondents, followed by Germany, Ireland, Italy and Spain.
- Out of the non-European markets, those from New Zealand and Australia were most likely to state that Britain was the only destination considered.

Australia	
France	49%
Italy	34%
Germany	33%
Another country	29%
Britain only	23%
US	17%
Canada	11%
Japan	6%
China	5%

Brazil	
France	44%
Italy	38%
Germany	37%
Portugal	36%
Spain	35%
Switzerland	25%
US	23%
Canada	16%
Britain only	12%
Another country	8%

Canada	
Ireland	43%
France	42%
Germany	30%
Italy	27%
Spain	26%
Australia	17%
Britain only	17%
Another country	13%
India	6%
China	5%

China	
France	44%
Germany	31%
Italy	27%
Switzerland	23%
US	20%
New Zealand	19%
Netherlands	18%
Canada	17%
Australia	16%
Britain only	13%
Another country	1%

Gulf	
France	26%
Switzerland	25%
Spain	22%
Turkey	18%
Italy	17%
Britain only	16%
US	14%
Germany	9%
Another country	9%
Canada	7%

India	
France	39%
US	38%
Switzerland	36%
Australia	30%
Italy	27%
Spain	22%
Britain only	11%
South Africa	10%
Another country	9%

Japan	
France	60%
Germany	43%
Italy	35%
Switzerland	26%
Australia	21%
Spain	21%
US	19%
Another country	13%
Britain only	11%

New Zealand	
Another country	32%
Britain only	32%
Italy	29%
Ireland	23%
Netherlands	23%
Austria	17%
US	16%
Czech Republic	14%
Canada	10%
Portugal	9%
South Africa	3%

South Korea	
France	51%
Germany	47%
Switzerland	32%
Spain	27%
US	22%
Australia	21%
Austria	20%
Canada	16%
Czech Republic	15%
Britain only	10%
Another country	9%

United States	
France	57%
Italy	47%
Germany	45%
Spain	44%
Ireland	33%
Australia	24%
China	13%
India	12%
Britain only	10%
Another country	6%

Britain and alternative destinations summary

Key takeouts:

- Amongst Europeans there is a relatively high proportion, especially from **Germany, Sweden** and the **Netherlands**, who **only considered Britain** as the destination for their trip. The share of these is smaller amongst international respondents but still highest amongst those from **New Zealand** and **Australia**.
- **France** is the most stated destination considered by both European as well as international visitors as an alternative destination which would be expected in view of the fact that it was the most visited destination worldwide again in 2016*.
- In Europe, **Britain's most considered competitors** after **France** were **Spain** and **Ireland**. Ireland was most considered among French, Spanish and German respondents.
- Amongst international respondents the picture was more varied but showed that the most considered alternative destinations overall were **France, Germany, Ireland, Italy** and **Spain**.

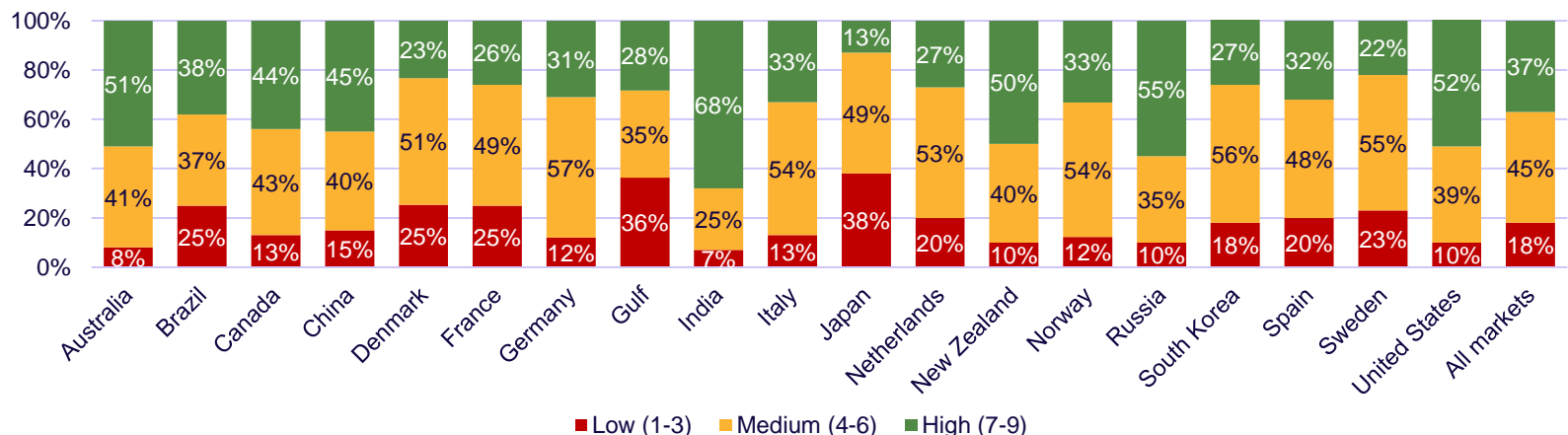


Knowledge of Britain and competitors

Knowledge of Britain by source market

“How much do you feel you know about each of these countries as a holiday destination? Britain (England, Scotland or Wales)?”

- Respondents who have not been to Britain but would consider coming (“Considerers”) were asked how much they knew about Britain as well as selected competitors.
- A large share of respondents stated either medium or high knowledge about Britain as a holiday destination. Indians, Australians, New Zealanders, Americans and Russians were most confident with either 90% or more of the respondents stating they have medium or high knowledge of Britain.
- Japanese respondents and those from the Gulf countries expressed lower knowledge with more than one in three in both markets stating low knowledge. Out of the European respondents, one in five of the Spanish and Dutch and about one in four from Sweden, Denmark and France felt that they have low knowledge of Britain as a holiday destination, which presents an opportunity to increase knowledge of Britain in these source markets.



Please note that response patterns in international surveys tend to vary in general by market e.g. Japanese respondents can display below average levels of agreement.

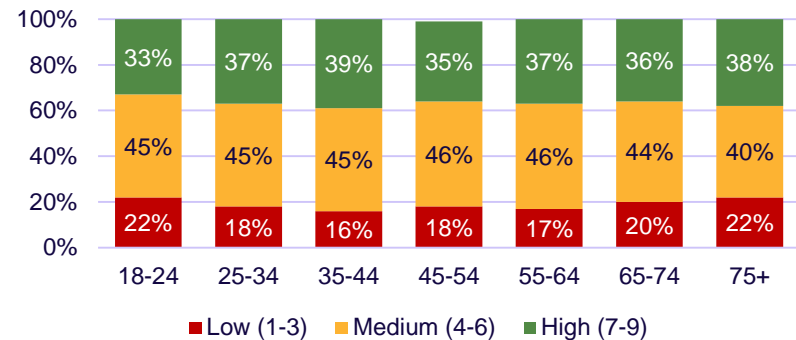
Source: Ipsos/VisitBritain, 2016. Base: considerers. Competitive set varied by market. Don't knows not displayed.

Knowledge of Britain by demographics

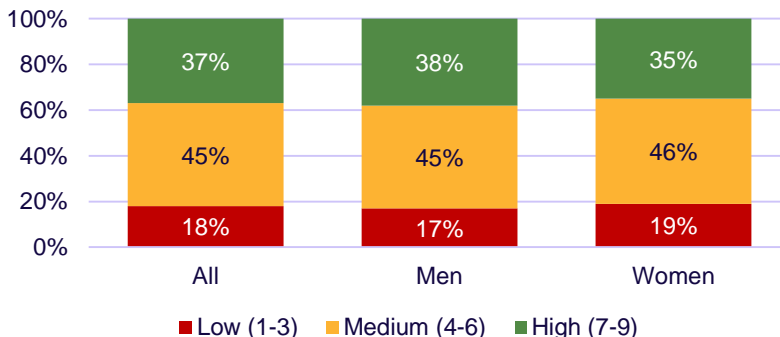
“How much do you feel you know about each of these countries as a holiday destination?
Britain (England, Scotland or Wales)?”

- Knowledge of Britain was fairly evenly distributed amongst gender and age.
- Those aged 35-44 had the highest share of those stating medium or high knowledge.
- The highest income bracket was the most likely to state high knowledge of Britain as a destination.

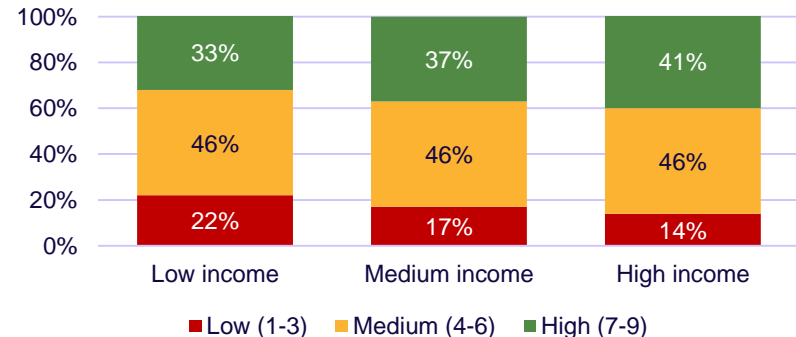
Knowledge of Britain by age



Knowledge of Britain by gender



Knowledge of Britain by income



Knowledge of Britain vs. competitors

“How much do you feel you know about each of these countries as a holiday destination?
France, Germany, Italy, Spain, U.S., Britain and Ireland (% with high knowledge indicated below)

Here we compare knowledge of Britain with knowledge of six selected destinations, among those who have not been to each country but would consider doing so. Britain shares first spot with the U.S. overall, ahead of France. Italy and Spain rank in joint third spot with one in three respondents overall stating high knowledge. Germany follows with 27% and Ireland comes last out of the set with just over one in five stating high knowledge of the destination.

- More than half of American, Indian, Russian and Australian respondents, as well as half from New Zealand, stated high knowledge of Britain as a holiday destination.
- France is best known by Russian, Indian, American, Brazilian, Italian and Canadian respondents.
- *The competitive set varied by market so not every destination was asked to every market.*

% with high knowledge	Australia	Brazil	Canada	China	Denmark	France	Germany	Gulf	India	Italy
France	33%	43%	40%	36%	29%		35%	16%	56%	42%
Germany	38%	45%	23%	43%	23%	13%		14%		14%
Italy	30%	46%	28%	46%	25%	32%	40%	18%	59%	
Spain		41%	27%			32%	40%	19%	52%	35%
U.S.	52%	48%		56%	24%	27%		24%	63%	32%
Britain	51%	38%	44%	45%	23%	26%	31%	27%	68%	33%
Ireland			35%		17%	15%	19%			

% with high knowledge	Japan	Neth.	New Zealand	Norway	Russia	South Korea	Spain	Sweden	U.S.	Total
France	20%	34%		18%	64%	33%	33%	17%	47%	35%
Germany	13%	41%		25%	49%	14%	14%	21%	38%	27%
Italy	18%	28%	24%	23%	64%		37%	24%	35%	33%
Spain	11%	29%			56%	19%			35%	33%
U.S.	17%		41%	34%	51%	22%	32%			37%
Britain	13%	27%	50%	33%	55%	27%	32%	22%	52%	37%
Ireland		18%	36%	18%			21%	14%	28%	22%

Please note that response patterns in international surveys tend to vary in general by market e.g. Japanese respondents can display below average levels of agreement.

Source: Ipsos/VisitBritain, 2016. Base: considerers. Competitive set and base sizes varied by market.

Average destination knowledge compared to knowledge of Britain

“How much do you feel you know about each of these countries as a holiday destination?
France, Germany, Italy, Spain, U.S., Britain and Ireland (% of knowledge level indicated below)

- Knowledge of Britain is stronger than the average knowledge of all destinations in the competitive set across most long haul markets. It is slightly weaker compared to the average knowledge of all markets for the Brazilian source market.
- Knowledge levels in the short haul markets show that most have similar knowledge of Britain and the competitor set. Spain and Italy stand out as having a wider gap between knowledge of Britain and that of other destinations as far as high knowledge is concerned.
- This suggests that most of the respondents feel that they have a good idea of what to expect from a holiday in Britain.

% of knowledge level	Japan		South Korea		Saudi Arabia		UAE		Australia		USA		Canada		New Zealand		India		Brazil		Russia		China	
	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain
High (7-9)	14	13	22	27	22	23	23	35	26	50	38	52	30	44	35	51	60	68	42	38	56	55	43	45
Medium (4-6)	50	49	60	56	38	35	45	35	47	40	48	39	51	43	51	41	30	25	39	37	35	35	42	40
Low (1-3)	36	38	19	18	40	42	31	29	27	10	14	10	18	13	14	8	10	7	19	25	9	10	16	15

% of knowledge level	Denmark		Sweden		Norway		Italy		German		France		Spain		Netherlands		All markets	
	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain	All	Britain
High (7-9)	25	23	20	22	31	33	27	33	33	31	22	26	25	32	29	27	31	36
Medium (4-6)	47	51	50	55	52	55	54	54	52	57	47	49	52	48	51	53	47	45
Low (1-3)	29	25	30	23	18	12	20	13	15	12	31	25	23	20	20	20	22	19

‘All’ refers to average knowledge of all destinations in the competitive set and is contrasted against knowledge of Britain by source market. The competitive set varies by market.

Please note that response patterns in international surveys tend to vary in general by market e.g. Japanese respondents can display below average levels of agreement.

Source: Ipsos/VisitBritain, 2016. Base: considerers. Competitive set and base sizes varied by market.

Knowledge of Britain and competitors

Key takeouts:

- **Knowledge of Britain is of either medium or high level for most of the respondents** who would consider Britain for a holiday but have not yet been to the destination. This finding suggests that they feel they have a **good idea of what to expect from a holiday in Britain**.
- Knowledge is **fairly evenly spread across age groups** and **gender** and those with **higher income** tend to have a **higher propensity** to state that they have **high knowledge of Britain** than respondents from the other income brackets.
- More than half of **Indian, Russian, American** and **Australian respondents** as well as half of the respondents from **New Zealand** stated high knowledge of Britain as a holiday destination. Generally speaking, in long haul markets there was strong knowledge on Britain compared to the average knowledge of the set of competitor destinations, with the exception of Brazil.
- Knowledge levels in the short haul markets show that most have similar knowledge of Britain and the competitor set. **Spain** and **Italy** stand out as having a higher level of knowledge of Britain compared to other destinations.
- **Britain shares first spot with the U.S.** in terms of high knowledge overall, ahead of France. Italy and Spain rank in joint third spot with one in three respondents overall stating high knowledge. Germany follows with 27% and Ireland comes last out of the set.
- This suggests that lack of perceived knowledge of Britain overall is not a competitive disadvantage; many travellers know – or at least think they know – what to expect. Indeed, over-familiarity with Britain might be a challenge.



Perceptions and knowledge of Britain and its competitors in 2016

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