

How the world views Britain – 2016

Foresight – issue 148

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Introduction

- This edition of Foresight is a summary of the key UK findings from the 2016 GfK Anholt Nations Brand Index survey, conducted in July 2016.
- The GfK Anholt 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. The overall 'nation brand' rank is based on scores across all attributes.
- In this report we first explore the UK brand on each of the NBI attributes and dimensions and changes over time. Keeping in mind the study details we then look at the 2016 familiarity and favourability ranks of the UK. The following section explores each of the tourism related dimensions (Tourism, Culture and Welcome) in more detail and changes to the UK rank on each of these over time. This article then looks at the 2015 UK rank results by market, highlighting some of the changes we have noticed, before concluding with investigating the UK's tourism and cultural word associations.
- These results paint a detailed picture of how Britain is perceived by prospective inbound visitors.

Study details

- The overall nation brand index is made up of six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment). For inbound tourism, the most relevant indices are of course Tourism as well as Culture, plus how ‘welcome’ respondents feel they would be in the UK (which appears under the People dimension).
- The rank for each dimension of the hexagon is made up of respondents’ answers to three to five questions - respondents are not directly asked to rank countries overall but they are asked their opinion about each country in relation to each question, e.g. ‘*To what extent do you agree that [the UK] is rich in historic buildings and monuments?*’ Please answer on a scale of one to seven where one is strongly disagree and seven is strongly agree’. They give a score for the country on that attribute and then scores are compared to those given to other countries to produce the rankings for each dimension and attribute.
- A change in the UK’s ranking might therefore be due to a change in the UK’s score and/or a change in the scores given to other nations in the survey.
- 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.



Headline findings

Headline summary

- The UK's overall NBI rank remains stable in 2016, in 3rd place, with the USA and Germany ahead in 1st and 2nd.
 - The UK is 5th for Tourism, one rank lower than 2015, stable in 5th place for Culture, and two places lower in 7th for People.
 - Governance has also dropped four places to 10th, whilst Exports and Immigration & Investment rankings remain stable in 4th and 5th place respectively.
- Within the Tourism dimension, the UK saw a drop in its ranking for natural beauty (down 6 places to 24th although the change in absolute score was small). Its rank for “would like to visit if money were no object” improved one place to 5th, its best ever.
- The UK saw a decline in its overall NBI ranking from France, USA and Germany with France down 5 places to 9th, USA down two places to 4th and Germany down one place to 7th. However, the UK saw an increase in its Tourism ranking from Germany to 5th (+4) although its ranking from France was down to 10th (-2), and USA 6th (-3). After big increases in 2015, UK's ranking from China for Tourism fell one place to 3rd.
- Overall cultural and tourism associations for the UK remain very stable; “educational”, “fascinating” and “exciting” are still the words most associated with the UK. Our museums have strong associations as do films and music which all have key links to Britain's tourism offer.

Top ten nation brands 2016

The overall top 10 nation brands this year are the same as in 2015, and the year before.

The UK remains in 3rd place, retaining the same spot it has held since 2011.

USA remains in first place for the second year in a row after taking Germany's position at the top last year.

Canada and Italy have moved up one place this year, whilst France and Japan have moved down.

All ten nations saw a drop in their overall NBI score in 2016.

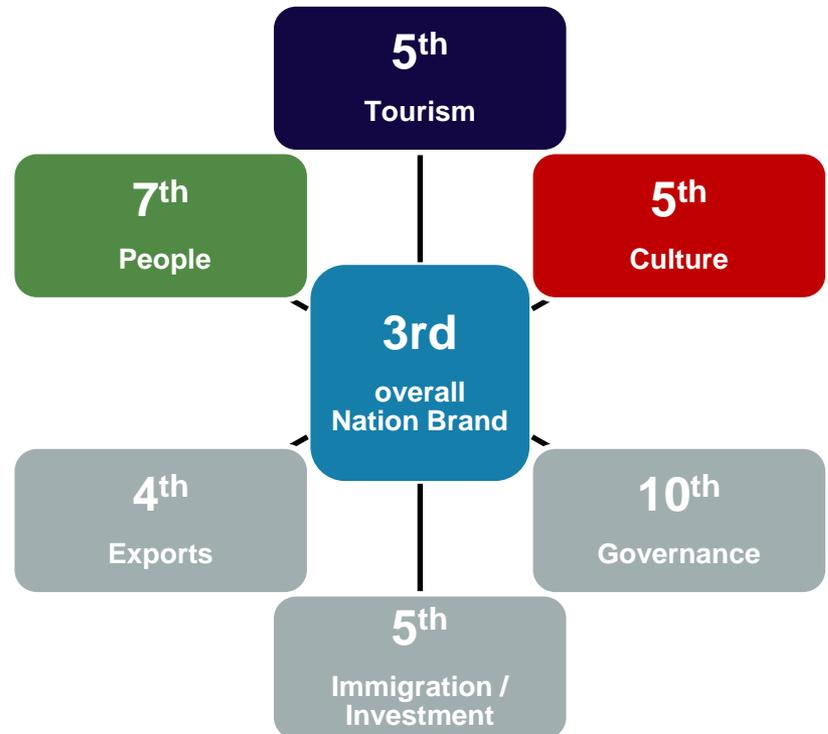
Rank	Nation	Change to 2015
1	United States	0
2	Germany	0
3	United Kingdom	0
4	Canada	+1
5	France	-1
6	Italy	+1
7	Japan	-1
8	Switzerland	0
9	Australia	0
10	Sweden	0

How the UK ranks in 2016

The overall Nation Brands Index is composed of six dimensions in the NBI hexagon.

Responses to several questions make up each of the six hexagon dimensions, as shown in more detail on the next 2 slides. Amongst the UK's highest attribute rankings are those for educational qualifications, contemporary culture, vibrant city life and urban attractions and being creative with new ways of thinking. British made products are also held in high regard as is the UK's reputation in the sporting arena.

In terms of business the UK attracts high rankings for investable businesses and the employability of people with British qualifications.



UK ranking for NBI dimensions and attributes

Tourism and **Culture** are strong dimensions for the UK; however, the **Tourism** ranking has dropped one place this year, down from 4th to 5th. Whilst 'natural beauty' shows a decrease in ranking, the actual score difference to last year is small.

Culture retains 5th place; however, the attributes that make up this dimension have dropped a place each, although the actual scores are similar to last year and all still remain well within the top 10. The UK's ranking for **People** is 7th, two places lower than last year. There is some change in the attributes, with 'welcome' dropping one place, although the actual score remains close to last year, whilst the other two attribute scores are slightly lower.

Hexagon dimension / attribute	UK rank in 2016	Change to 2015
TOURISM	5	-1
Rich in historic buildings & monuments	5	0
Vibrant city life & urban attractions	4	0
Would like to visit if money was no object	5	+1
Rich in natural beauty	24	-6
CULTURE	5	0
Interesting & exciting for contemporary culture	4	-1
Excels at sport	5	-1
Has a rich cultural heritage	7	-1
PEOPLE	7	-2
If visited, people would make me feel very welcome	12	-1
Would like a person from country as a close friend	5	0
Would employ well-qualified person from country	5	-1

UK ranking for NBI dimensions and attributes

The UK's ranking for **Exports** has seen no movement since last year, retaining 4th place, and all attributes in the top 5.

Immigration and Investment also remains stable, with the UK ranked in 5th place, and some minor variation in the attributes that make up this dimension.

The **Governance** dimension has fallen four places this year compared to last, now in 10th place. The attributes that have seen the biggest shift are 'competently and honestly governed' and 'behaves responsibly in international peace and security'. This year's NBI study was carried out in July, just a few weeks after the UK referendum decision, which could have had a direct impact on the results for Governance.

Hexagon dimension / attribute	UK rank in 2016	Change to 2015
EXPORTS	4	0
Major contributor to innovation in science & tech.	5	0
Feel better about buying product if made there	4	0
Creative, cutting-edge ideas & new ways of thinking	4	0
IMMIGRATION-INVESTMENT	5	0
Willing to live & work there for substantial period	5	0
A place with a high quality of life	7	-1
A good place to study for educational qualifications	2	0
Has businesses I'd like to invest in	5	-1
Cares about equality in society	8	-1
GOVERNANCE	10	-4
Competently & honestly governed	10	-5
Respects the rights of citizens & treats with fairness	6	0
Behaves responsibly in int. peace & security	11	-5
Behaves responsibly to protect the environment	12	-2
Behaves responsibly to help reduce world poverty	6	-2



Tourism, Culture and Welcome rankings

Tourism ranking

The UK's rank for **Tourism** drops 1 place this year, down from 4th place last year to 5th. This drop in ranking is driven mainly by decreases across two attributes – natural beauty and would like to visit if money was no object. However, **Visit if money was no object** has actually increased in *ranking*, due to the weaker performance of some other countries.

Natural beauty, despite being a weaker attribute for the UK, had experienced a steady increase in our ranking over the last few years. Whilst there is a decrease in ranking this year, the actual score difference is minor compared to last year, due to a close grouping of scores among countries.

	2008	2009	2010	2011	2012	2013	2014	2015	2016
TOURISM	4	5	5	4	4	4	3	4	5
Is rich in historic buildings and monuments	4	4	4	4	5	5	5	5	5
Has a vibrant city life and urban attractions	4	4	4	4	4	4	4	4	4
Would like to visit if money was no object	7	8	8	6	6	6	5	6	5
Is rich in natural beauty	23	24	22	22	22	20	20	18	24

Culture ranking

The UK's overall ranking for culture remains stable in 5th place, the same ranking as for 2014 and 2015.

Rankings for the individual culture elements have fallen 1 place each compared to last year.

Contemporary culture, traditionally a strong attribute for the UK, is 4th, dropping from 3rd place which was maintained for 4 years prior; however, the score difference is minor.

Perceptions that the UK excels at sport has fallen, down to 5th place after, but still above the levels seen prior to 2011, and the score difference is also small.

The UK's cultural heritage is ranked in 7th place, after a brief stint in 6th last year.

	2008	2009	2010	2011	2012	2013	2014	2015	2016
CULTURE	3	4	6	4	4	4	5	5	5
Is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4	4	4	3	3	3	3	4
Excels at sport	7	8	8	5	6	5	4	4	5
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7

People and Welcome ranking

Although not to the extent of ‘natural beauty’, ‘welcome’ is another area of relative weakness for the UK.

Overall ranking of the UK’s welcome – ‘if visited, the people would make me feel very welcome’ – improved to 11th place last year, and whilst in 2016 this ranking has fallen one place, the absolute score remains very close to last year’s score.

The People dimension has overall fallen two places down to 7th this year, a low rank that has not been experienced in the last eight years, driven by small decreases in the individual attributes that make up the overall score.

	2008	2009	2010	2011	2012	2013	2014	2015	2016
PEOPLE	6	6	6	4	4	4	4	5	7
If visited, the people would make me feel very welcome	14	13	13	12	13	10	13	11	12

UK rankings for Tourism, Culture and Welcome attributes, by market

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United States
OVERALL NBI	3	13	2	7	4	3	5	9	7	4	3	5	6	6	5	2	3	3	14	4
TOURISM	5	17	2	11	6	3	8	10	5	4	4	6	10	12	9	3	2	4	16	6
Rich in historic buildings & monuments	5	14	3	9	5	5	9	9	6	5	6	6	8	8	8	3	6	6	12	7
Vibrant city life & urban attractions	4	8	3	7	6	4	9	5	5	5	3	4	7	5	6	2	2	2	16	5
Would like to visit if money was no object	5	17	4	12	8	3	8	13	13	7	4	7	12	17	12	2	3	6	16	5
Rich in natural beauty	24	39	10	27	21	15	24	35	18	8	27	27	22	42	40	20	20	26	34	17
CULTURE	5	8	3	8	5	4	4	6	4	5	4	5	7	4	7	2	1	3	11	5
Interesting & exciting for contemporary culture	4	6	3	6	5	4	4	4	3	3	3	4	5	3	4	2	3	3	12	4
Excels at sport	5	9	3	12	6	5	8	5	4	10	6	5	9	7	8	5	3	3	14	5
Has a rich cultural heritage	7	14	4	11	8	3	8	9	7	6	7	7	10	9	11	13	5	8	12	6
PEOPLE	7	26	4	12	10	10	13	16	12	4	5	8	12	22	11	5	6	3	29	4
If visited, people would make me feel very welcome	12	39	4	18	12	19	26	16	17	8	14	13	17	24	36	9	12	8	34	5

Market rankings summary

The UK's overall NBI ranking is consistent with last year; however, there has been some fluctuation by market:

- **France:** the UK's NBI rank from its biggest inbound market by volume fell five places to 9th. The UK saw decreases in rankings across all main metrics from France, apart from 'vibrant cities'. 'Natural beauty' and 'People' saw the biggest ranking decreases, down eight places each.
- **Germany:** the UK's NBI ranking fell one place to 7th from Germany. However, Tourism increased its ranking by four places, to 5th, with an increase in 'vibrant cities'.
- **USA,** the UK's biggest inbound market by value, gave the UK an overall NBI rank of 4th, a decrease of 2 places, and minor decreases in rankings across all attributes apart from sport.
- Last year **China** ranked the UK in 2nd place overall, and also for Tourism, and 1st for Culture. This year the UK has eased down to 3rd place for both the overall NBI and Tourism.
- Whilst **Turkey** ranks the UK low across a number of attributes, perceptions of the UK by this market have improved sharply since last year. The overall NBI has increased by 9 places to 14th and Tourism is up 14 places to 16th, driven by increases across all attributes.
- **Australia** and **South Africa** both remain favourable to the UK, maintaining strong NBI and Tourism rankings, whilst **South Korea** shows an improvement in ranking of both attributes, with Tourism up two places to 2nd.

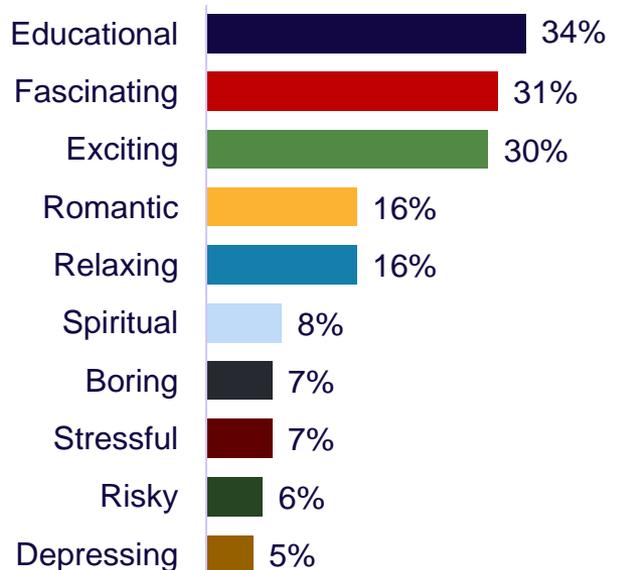


Tourism and Culture associations

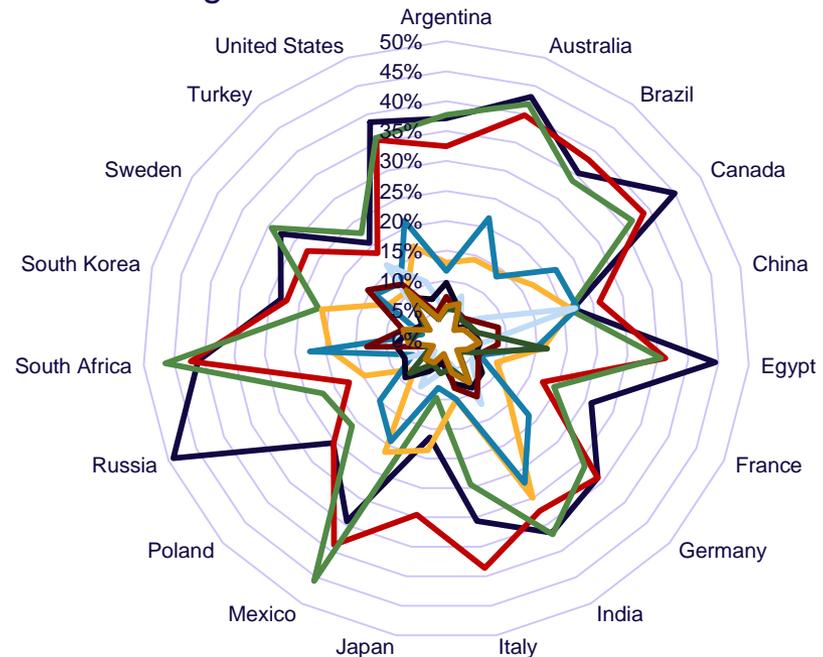
Tourism word associations

The UK is most likely to be thought of as educational (34%), followed by fascinating and exciting. This is likely to be a reflection of the rich history and culture that the UK is ranked highly for. The UK is also highly regarded in terms of offering world class study opportunities, and is ranked 2nd for 'is a good place to study for educational opportunities' retaining its place as the highest single attribute rank for the UK. The below results are very similar to those seen in 2015.

The UK is thought of as educational by many markets, in particular Russia, Egypt and Canada. Mexico, South Africa and Sweden are more likely to think the UK is exciting. South Korea, India and China are more likely to associate the UK with being a romantic destination.



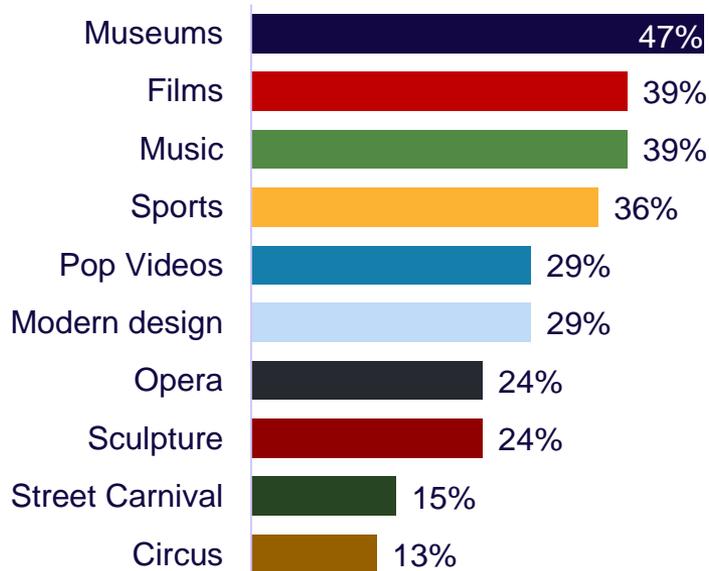
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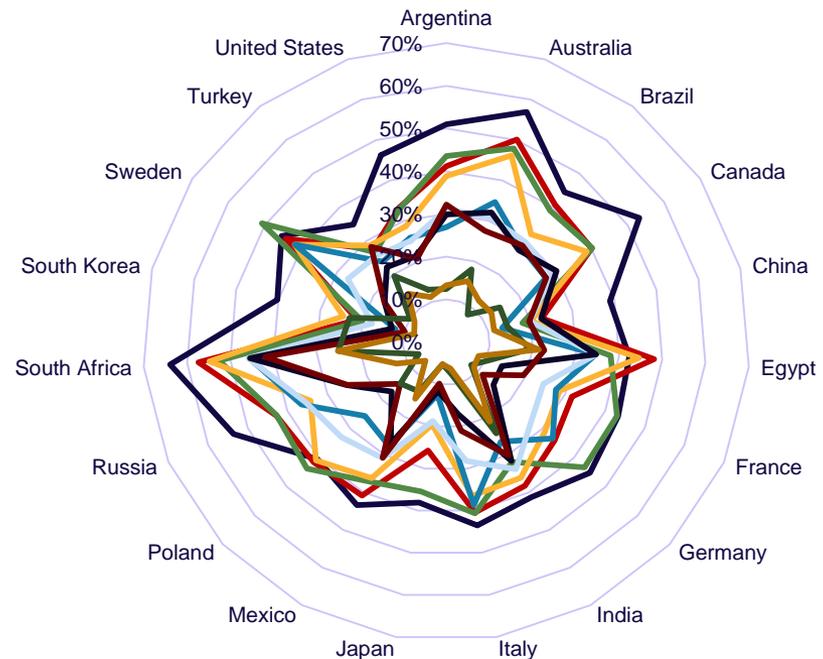
Cultural products associated with the UK

Almost half of respondents associate the UK with museums, which is the same proportion as last year. Films and music are in second and third place for association with the UK, both of which have a strong link to tourism and a driver for visiting certain locations and regions around Britain. Again, these results are very similar to 2015's.

South Africa, Australia, Canada and Russia are the most likely to associate Britain with museums. Egypt and Poland are more likely to associate the UK with films than museums, and the UK's top cultural product in Sweden is actually music. Egypt strongly associate Britain and Sport, for which Britain is ranked strongly in most markets, except China, Japan, South Korea and Turkey.



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Familiarity, favourability and past visitors

UK rankings for familiarity and favourability

Overall, Britain's scores for **Familiarity** are similar to those seen in 2015 although **Favourability** has fallen for some markets.

South Africa, Italy and **Australia** give the UK similar scores to last year, with the UK remaining near the top for both favourability and familiarity.

Last year **Poland** ranked us 2nd for favourability and 3rd for familiarity; however, this year the results show a decrease for both, especially favourability.

The UK has dropped 8 places for favourability from respondents in **France**, who ranked the UK in 17th place. The **USA** has given the UK a slightly lower rank this year for favourability and familiarity, down 3 places.

Turkey's favourability towards the UK has improved 6 places on last year. Familiarity remains the same.

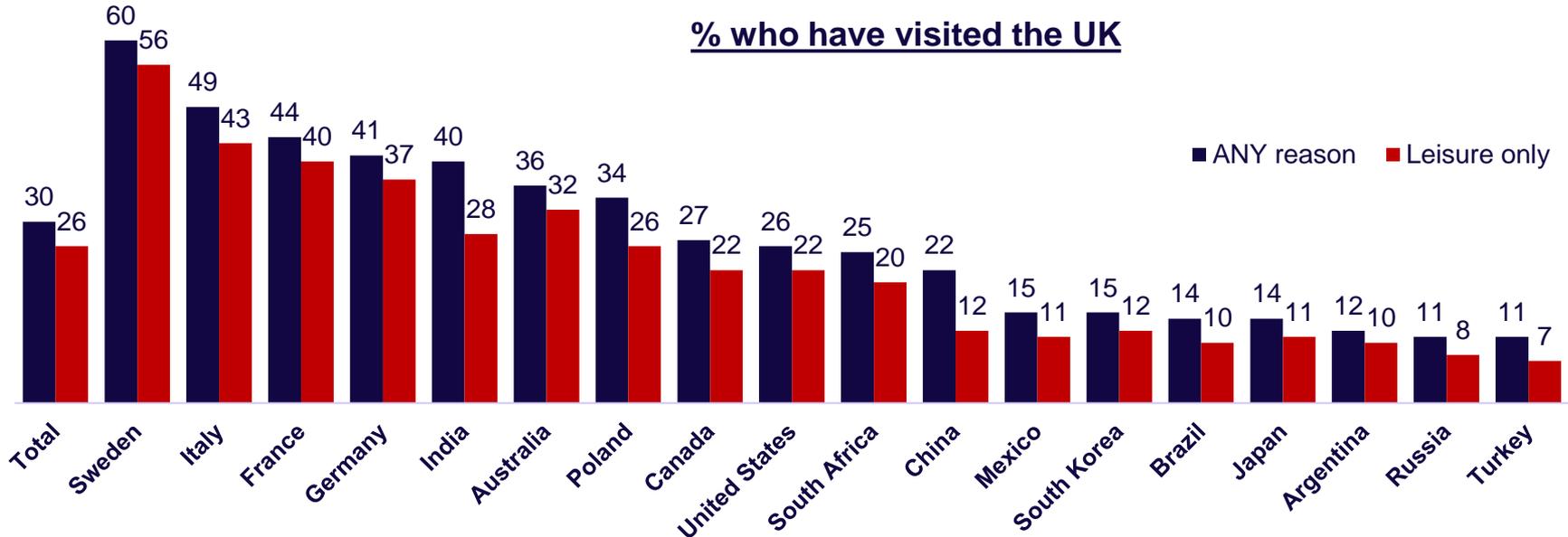
Japan still rates us highly for familiarity; however, favourability has fallen, down to 12th instead of 3rd last year. **South Korea** and **Russia** also rank us 4 places down for favourability.

Mexico and Brazil: familiarity improves this year, up 10 and 6 places respectively although favourability is similar.

	UK's RANK FOR FAVOURABILITY	UK's RANK FOR FAMILIARITY
South Africa	1	2
Italy	2	4
Australia	4	3
India	5	6
Sweden	6	5
USA	6	5
Canada	7	5
China	7	7
Mexico	9	12
South Korea	9	5
Brazil	10	13
Poland	10	7
Argentina	12	16
Japan	12	3
Russia	15	9
Turkey	15	25
Germany	16	9
France	17	7

Previous visitors to the UK

As we have seen in a number of other studies and in previous NBI results, those who have previously visited the UK often have more positive views of the UK compared to those who have not yet visited. The top nations most likely to have visited are close European neighbours; however, **India** and **Australia** also have a high proportion of visits. **India** and **China** have a bigger gap between visits for any reason and leisure visits, likely to be driven by a larger number of business visits from these markets to the UK.



Holiday visits to the UK from NBI markets

- Just over 20,000 respondents were interviewed this year, with around 1,000 from each of 20 countries (including the UK) around the world scoring the UK on each attribute. Interviewing was conducted in July 2016.
- In 2015 there were over 8 million holiday visits made to the UK by residents of the 19 panel countries (therefore excluding the UK) who contribute to the NBI scores and rank. These 8 million visits represented 58% of the all holiday visits to the UK last year, according to the latest available IPS data.
- The NBI remains an important tool for VisitBritain to measure perceptions as the UK's three largest markets (France, Germany and the USA) are covered, as well as sizeable markets like Italy, Australia, Sweden, Canada and Poland. Views were also collected in emerging markets including Brazil, Russia, India, China and South Korea. However, there are absences from our top ten markets including Irish Republic, Netherlands and Belgium whose views may vary from those presented here.

	Number of holiday visits to UK (000s)	% of all holiday visits to the UK
France	1,893	13.7%
Germany	1,550	11.2%
USA	1,363	9.8%
Italy	860	6.2%
Australia	434	3.1%
Sweden	380	2.7%
Canada	263	1.9%
Poland	233	1.7%
Brazil	203	1.5%
South Korea	173	1.2%
India	144	1.0%
China	142	1.0%
Japan	94	0.7%
Argentina	90	0.6%
Mexico	67	0.5%
Russia	55	0.4%
Turkey	48	0.3%
South Africa	44	0.3%
Egypt	16	0.1%
TOTAL	8,052	57.9%



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