

# How the world views the UK – 2020

Foresight – issue 178

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# Introduction

This edition of Foresight is a summary of the key UK findings from the 2020 Anholt-Ipsos Nation Brands Index survey, conducted between 15<sup>th</sup> July and 29<sup>th</sup> August 2020. The results paint a detailed picture of how the UK is perceived internationally.

The Anholt-Ipsos Nation Brands Index (or NBI) 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. The 20 panel countries are: Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK, and USA.

In this report we first explore the UK brand on each of the NBI attributes and dimensions. 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. We then look at the results by market, highlighting the changes between 2019 and 2020 as well as changes in familiarity and favourability for those markets, before investigating the UK's tourism and cultural word associations for all 20 markets.

# Study details

The overall Nation Brands 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 statements – respondents are not directly asked to rank countries overall but they are asked their opinion about a country in relation to each statement, 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. Ranking changes can be the result of small changes in scores. Nations often rank themselves top on several dimensions (although Chinese respondents cannot rate China).

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.

## Context: holiday visits from NBI markets

In 2019 there were over 9.6 million holiday visits made to the UK by people who reside in one of the 19 countries this report focuses on (therefore excluding the UK). These 9.6 million visits represented 57% of all holiday visits to the UK in 2019 - the latest available IPS data.

The NBI remains an important tool for VisitBritain to measure perceptions as the UK's three largest markets by volume (USA, France and Germany) are covered, as well as sizeable markets like China, Italy, Australia, Sweden, Canada and Poland.

Views were also collected in other emerging markets including Brazil, Russia and India. However, there are still some absences from our top ten markets whose views may vary from those presented here: the Irish Republic, Spain, Netherlands and Belgium.

2019 holiday visits to the UK from...	Number in thousands	As percentage of all holiday visits
USA	2,208	13.1%
France	1,535	9.1%
Germany	1,500	8.9%
Italy	1,155	6.8%
China	512	3.0%
Australia	449	2.7%
Canada	368	2.2%
Sweden	302	1.8%
Poland	276	1.6%
India	206	1.2%
Japan	205	1.2%
South Korea	203	1.2%
Brazil	198	1.2%
Mexico	136	0.8%
Argentina	92	0.5%
Russia	80	0.5%
Turkey	80	0.5%
South Africa	55	0.3%
Egypt	16	0.1%
<b>TOTAL</b>	<b>9,574</b>	<b>56.6%</b>



# Headline findings

# Headline summary

The UK claimed a record high 2<sup>nd</sup> place in the Nation Brands Index 2020, ahead of Canada in 3<sup>rd</sup>. Germany continued to hold 1<sup>st</sup> place – a position it has held since 2017.

Gains in perceptions of the UK were made across almost all dimensions compared to 2019:

- Consistent performance for **Tourism**, retaining 4<sup>th</sup> position
- **Culture** rose two places to a record equalling 3<sup>rd</sup>
- A three place jump for **People** into a record equalling 4<sup>th</sup>
- **Exports** and **Immigration/investment** both maintained their 2019 levels at 4<sup>th</sup>
- **Governance** moved up one place to 10<sup>th</sup> this year

Looking at the **Tourism**, the UK held onto the ranking positions from 2019 for historic buildings (5<sup>th</sup>) and vibrant city life (4<sup>th</sup>). **Natural beauty** gained three ranking places after losing two in 2019 to claim 23<sup>rd</sup> place while the aspirational **visit if money were no object** rose one rank to a record equalling 6<sup>th</sup>.

The UK gained two ranks in the overall **Culture** dimension, losing one rank place for **contemporary culture** (4<sup>th</sup>), but jumping two ranks to 3<sup>rd</sup> for **excelling at sport** and regaining a rank for **cultural heritage** (6<sup>th</sup>).

2020 saw the **People** dimension and all attributes rise, compared to 2019 – setting a new record along the way. The UK's **welcome** ranked 11<sup>th</sup> (up five places, but not quite a record), having a **person from the UK as a close friend** improved one rank to an record equalling 3<sup>rd</sup>, while **employing a qualified person** from the UK rose a place to set a new record of 3<sup>rd</sup>.

There was a rise in our overall NBI ranking from nine countries. There were four countries where the UK retained its 2019 rank, excluding the UK itself, while the ranking deteriorated from six countries.

# Top ten nation brands 2020

The overall top ten nation brands this year are the same as they have been in the past five years. However, there have been some notable changes in the ranks for some countries. The UK has leapfrogged two rank places this year – into a record setting 2<sup>nd</sup> place.

There have been some notable changes in the ranks for some countries. Germany continues to hold top spot for the fourth year in a row (briefly holding second in 2015 and 2016).

While many nations have either held position or gained, the gains have mostly been made at the expense of France which has fallen 3 ranks this year.

The USA has not seen any recovery from the significant fall of five places in 2017, falling another four places and just holding a place in the top 10.

Rank	Nation	Change vs 2019
1	Germany	0
2	United Kingdom	+2
3	Canada	0
4	Japan	+1
5	France	-3
6	Italy	+1
7	Switzerland	+1
8	Sweden	+1
9	Australia	+1
10	USA	-4

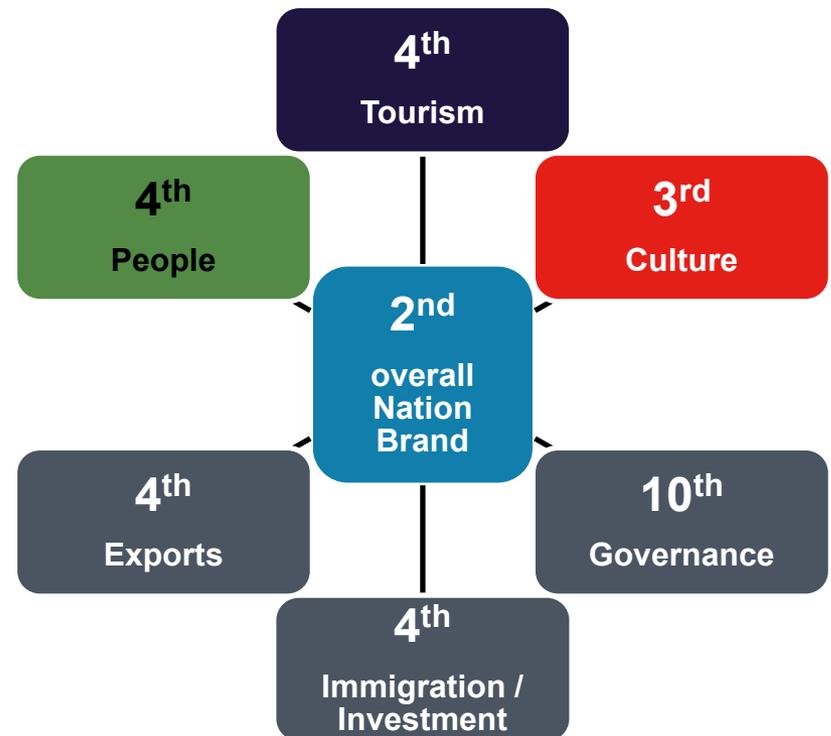
# How the UK ranks in 2020

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

Responses to several statements make up each of the six hexagon dimensions, as shown in more detail on the next two 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 – these have been consistently ranked highly.

Having a close friend from the UK and willingness to live and work in the UK were held in high regard, as is the UK's reputation around our Exports.



# UK ranking for NBI dimensions and attributes - 1

**Tourism** maintained 2019's rank with 4<sup>th</sup> place. Within the tourism dimension a place to visit if money was no object gained a place to record equalling 5<sup>th</sup>. The UK held its 2019 rank for historical buildings and vibrant urban life Natural beauty remains a relative weakness for perceptions of the UK, but has moved up three ranks in 2020 to 23<sup>rd</sup> – though not quite enough to set a record.

The UK's **Culture** jumped two ranks this year, claiming 3<sup>rd</sup> place, the record equalling rank last held in 2008. Excelling at sports continued the record setting, up two ranks to 3<sup>rd</sup>. Rich cultural heritage rose one rank, to 6<sup>th</sup> after four years in 7<sup>th</sup> place.

Contemporary culture slipped a rank to 4<sup>th</sup>.

The UK's ranking for **People** saw a substantial improvement – up three ranks to a record matching 4<sup>th</sup> this year. All attributes within the people dimension saw rank improvements in the 2020 results – with welcome leaping five ranks.

Hexagon dimension / attribute	UK rank in 2020	Change to 2019
<b>TOURISM</b>	<b>4</b>	<b>-</b>
Rich in historic buildings & monuments	5	-
Vibrant city life & urban attractions	4	-
Would like to visit if money was no object	5	+1
Rich in natural beauty	23	+3
<b>CULTURE</b>	<b>3</b>	<b>+2</b>
Interesting & exciting for contemporary culture	4	-1
Excels at sport	3	+2
Has a rich cultural heritage	6	+1
<b>PEOPLE</b>	<b>4</b>	<b>+3</b>
If visited, people would make me feel very welcome	11	+5
Would like a person from country as a close friend	3	+1
Would employ well-qualified person from country	3	+1

## UK ranking for NBI dimensions and attributes - 2

The UK's ranking for **Exports** has retained 4<sup>th</sup> place, with all attributes in the top five and at least holding 2019 places.

**Immigration and Investment** has retained 4<sup>th</sup>, with willingness to live and work in the UK and studying for education qualifications in the top three. A place with high quality of life rose one place this year.

The **Governance** dimension regained the rank lost in 2019, back to the 10<sup>th</sup> position. There was an increase of two ranks for perceptions of international peace & security and one for competently and honestly governed; all other attributes remained at 2019 levels.

Hexagon dimension / attribute	UK rank in 2020	Change to 2019
<b>EXPORTS</b>	<b>4</b>	<b>-</b>
Major contributor to innovation in science & tech.	<b>5</b>	<b>-</b>
Feel better about buying product if made there	<b>4</b>	<b>-</b>
Creative, cutting-edge ideas & new ways of thinking	<b>4</b>	<b>+1</b>
<b>IMMIGRATION-INVESTMENT</b>	<b>4</b>	<b>-</b>
Willing to live & work there for substantial period	<b>3</b>	<b>-</b>
A place with a high quality of life	<b>5</b>	<b>+1</b>
A good place to study for educational qualifications	<b>2</b>	<b>-</b>
Has businesses I'd like to invest in	<b>6</b>	<b>-</b>
Cares about equality in society	<b>10</b>	<b>-</b>
<b>GOVERNANCE</b>	<b>10</b>	<b>+1</b>
Competently & honestly governed	<b>11</b>	<b>+1</b>
Respects the rights of citizens & treats with fairness	<b>10</b>	<b>-</b>
Behaves responsibly in int. peace & security	<b>10</b>	<b>+2</b>
Behaves responsibly to protect the environment	<b>13</b>	<b>-</b>
Behaves responsibly to help reduce world poverty	<b>8</b>	<b>-</b>



# Tourism, Culture and Welcome rankings

# Tourism ranking

The UK's rank for **Tourism** maintained its 2019 position with 4<sup>th</sup> place.

Across the attributes that make up this tourism dimension, there have been no changes in the UK's rank for **historic buildings and monuments** and **vibrant urban life** – both historically strong attributes for the UK. As a destination to **visit if money was no object** the UK improved one rank on the 2020 result to hold a record equalling 5<sup>th</sup> and continuing the pattern of rising then falling a place each following year since 2013.

**Natural beauty** remains a weaker attribute for the UK. In 2019, this attribute lost two places, to rank 26<sup>th</sup>, its lowest rank ever. 2020 saw the UK rank bounce back three places to 23<sup>rd</sup>. Rank movement for this attribute is usually due to a close grouping of actual scores among countries.

TOURISM dimension and attributes	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Overall</b>	4	5	5	4	4	4	3	4	5	3	4	4	4
Is rich in historic buildings and monuments	4	4	4	4	5	5	5	5	5	5	5	5	5
Has a vibrant city life and urban attractions	4	4	4	4	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	6	5	6	5
Is rich in natural beauty	23	24	22	22	22	20	20	18	24	24	24	26	23

# Culture ranking

The UK's overall ranking for the culture dimension rose two places this year to a record equalling 3<sup>rd</sup>.

**Contemporary culture remains a strong attribute** for the UK, but we saw our rank slip back to 4<sup>th</sup> in 2020. Over the past six years this attribute has yo-yoed between 3<sup>rd</sup> and 4<sup>th</sup>.

Perceptions that the UK **excels at sport improved two ranks this year to a record setting 3<sup>rd</sup>** place this year. There has been a noticeable shift in this attribute since the rankings pre-2011, but 3<sup>rd</sup> is the highest rank on record.

The UK's **cultural heritage** rose a ranking place this year to 6<sup>th</sup>, after four consecutive years of holding 7<sup>th</sup>, although this is a ranking that has mostly held steady since 2008.

CULTURE dimension and attributes	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Overall</b>	3	4	6	4	4	4	5	5	5	5	4	5	3
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	3	4	3	4
Excels at sport	7	8	8	5	6	5	4	4	5	4	5	5	3
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7	7	7	7	6

# People and Welcome ranking

After holding 4<sup>th</sup> place between 2011 and 2014, perceptions of the UK's people has been changeable. After falling to 7<sup>th</sup> in 2019, 2020 saw the UK's rank dramatically recover three places to a record equally 4<sup>th</sup>.

Overall ranking of the UK's welcome attribute is most relevant to VisitBritain within the people dimension – **if visited, the people would make me feel very welcome**. Similar to the main dimension, this attribute has risen five places in 2020 to secure 11<sup>th</sup> although this isn't quite record setting. The UK's actual score in 2020 is in line with the score received in the previous 4 years suggesting the change in ranking is due to a close grouping of scores among countries.

Although not to the extent of natural beauty, **welcome** is an area of relative weakness for the UK.

PEOPLE dimension and monitored attribute	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Overall	6	6	6	4	4	4	4	5	7	6	6	7	4
If visited, the people would make me feel very welcome	14	13	13	12	13	10	13	11	12	13	15	16	11

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

Dimension / Attributes in 2020	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
<b>OVERALL NBI</b>	2	9	4	6	2	1	3	8	17	4	4	3	8	3	6	1	4	4	12	1	3
<b>TOURISM</b>	4	11	3	9	4	2	8	9	15	4	7	5	9	9	8	3	7	4	13	1	3
Rich in historic buildings & monuments	5	9	4	7	5	3	7	7	6	3	6	6	8	7	5	3	7	6	8	1	4
Vibrant city life & urban attractions	4	7	2	8	6	1	6	5	7	3	4	3	7	6	8	2	4	1	12	1	3
Would like to visit if money was no object	5	13	4	12	2	10	8	14	16	6	8	5	10	8	8	4	5	3	19	1	4
Rich in natural beauty	23	29	16	25	17	10	14	31	32	7	31	28	23	41	34	33	18	23	31	4	16
<b>CULTURE</b>	3	6	2	8	5	2	5	4	5	4	4	5	10	4	7	1	3	4	7	1	4
Interesting & exciting contemporary culture	4	6	2	6	4	2	2	4	4	3	3	4	7	2	7	2	4	3	7	1	4
Excels at sport	3	9	3	10	5	5	7	5	7	8	7	5	11	7	7	4	3	5	9	2	4
Has a rich cultural heritage	6	11	6	11	5	4	6	7	9	3	7	6	13	8	8	14	6	9	6	1	4
<b>PEOPLE</b>	4	14	4	5	3	1	3	15	18	3	7	7	11	11	10	4	9	6	17	1	4
If visited, people would make me feel very welcome	11	26	4	13	5	7	14	18	21	4	13	18	19	19	35	7	22	8	40	4	5

# UK ranking changes for Tourism, Culture and Welcome attributes, by market

Dimension / Attributes changes in 2020 vs 2019	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
<b>OVERALL NBI</b>	2	1	-1	3	4	2	3	-2	-5	0	-2	2	-2	-1	2	0	1	0	2	0	0
<b>TOURISM</b>	0	0	0	2	3	1	3	3	-4	-2	-4	0	0	-1	3	0	2	1	5	0	0
Rich in historic buildings & monuments	0	-2	-1	3	0	-2	5	1	0	-1	-1	1	1	-1	5	0	0	0	3	0	0
Vibrant city life & urban attractions	0	0	1	-1	0	2	1	2	-1	-2	-1	1	2	-2	0	0	1	1	8	0	0
Would like to visit if money was no object	1	4	0	1	7	-6	1	-1	1	-3	-3	2	0	2	4	1	4	5	-1	0	1
Rich in natural beauty	3	6	-2	3	4	1	18	2	-1	0	0	8	-4	-1	4	-2	3	7	10	-2	2
<b>CULTURE</b>	2	3	0	0	2	1	2	-1	-2	-2	-2	0	-1	-1	0	2	1	-2	2	0	-2
Interesting & exciting contemporary culture	-1	1	0	2	2	1	4	-1	-1	0	0	0	-1	0	-2	0	0	-1	2	0	-1
Excels at sport	2	0	0	2	2	-1	0	-1	-2	-4	-2	2	-3	-2	1	3	1	0	4	0	-2
Has a rich cultural heritage	1	0	-1	1	5	-1	6	0	-3	0	-4	0	-1	-2	1	3	1	-2	3	0	0
<b>PEOPLE</b>	3	7	-1	8	6	4	7	1	0	1	1	0	0	-1	11	-1	-4	0	8	0	-1
If visited, people would make me feel very welcome	5	8	0	3	8	0	18	1	0	11	4	-3	-2	3	3	8	-3	-2	5	-1	-1
<b>RANK FOR FAVOURABILITY</b>	0	4	0	0	5	2	5	2	-1	4	-1	6	-1	2	10	1	2	5	6	0	0
<b>RANK FOR FAMILIARITY</b>	-1	2	0	2	3	0	-	2	0	-2	-2	4	-2	0	0	0	1	-2	8	0	0

## Market rankings summary (1/4)

The UK's NBI ranking from **Germany** fell further this year by five ranks— the fifth year of consecutive decreases. The UK now ranks 17<sup>th</sup> overall, the lowest rank on record from Germany. Across the dimensions and attributes we usually track, only the aspirational **visit if money was no object** saw a rank rise this year (up one to 16<sup>th</sup>). Tourism (15<sup>th</sup>) fell four ranks, with **historic buildings** (6<sup>th</sup>) holding the place gained in 2019, but **vibrant cities** (7<sup>th</sup>) and **natural beauty** (32<sup>nd</sup>) both dropping a rank each. Natural beauty posted the worst result on record. Although dropping two ranks to 5<sup>th</sup>, **Culture** and all attributes within it rank the UK in the top 10. **People** and **welcome** held the ground made in 2019 and came in 18<sup>th</sup> and 21<sup>st</sup> respectively.

**Sweden** still ranks the UK 4<sup>th</sup> overall in 2020, the same UK rank position since 2017. Similarly, **People** has been stable since 2017 when the UK slipped to 6<sup>th</sup> for the Swedes. Within People, **welcome** lost the two rank places gained in 2019 to return to 8<sup>th</sup>. For **Tourism** overall, the UK gained a place to move into 4<sup>th</sup> with all attributes regaining the ground lost in 2019, with the exception of **historic buildings** that maintained 6<sup>th</sup>. **Natural beauty** rose seven places to a record setting 23<sup>rd</sup>. The UK ranked 4<sup>th</sup> for **Culture**, down two places on 2019 results. **Contemporary culture** (3<sup>rd</sup>) lost a rank in 2020 and **cultural heritage** (9<sup>th</sup>) lost two places.

Overall perceptions of the UK from **Poland** fell one place to 3<sup>rd</sup> this year. After good results in 2019, the UK's ranking has slipped back across most dimensions and attributes. Only **welcome** and **visit if money was no object** improved. However, it is worth noting that overall the UK mostly ranks in the top 10 - just **natural beauty** (41<sup>st</sup>), **People** (11<sup>th</sup>) and **welcome** (19<sup>th</sup>) fall outside the top 10.

**Turkey** prompted the UK to record positions in 2020 – though rankings remain relatively low. The UK achieved an overall rank of 12<sup>th</sup> in 2020, the best result so far. **Tourism** rose five ranks to 13<sup>th</sup>, **Culture** gained two ranking place to settle in 7<sup>th</sup> and **People** climbed an impressive eight ranks this year to 17<sup>th</sup>. All three of these dimensions set new ranking records this year.

## Market rankings summary (2/4)

**France** is in the UK's top four inbound markets by both volume and value. After some signs of recovery in perceptions since the 2016 low, the UK lost a further two places this year, down to 8<sup>th</sup> in the overall ranking. Despite this, **Tourism** gained three places to 9<sup>th</sup> with **historic buildings** (7<sup>th</sup>), **vibrant cities** (5<sup>th</sup>) and **natural beauty** (31<sup>st</sup>) all improving their ranking in 2020 from last year. **Culture** lost a place against the record of 3<sup>rd</sup> in 2019. Both **People** and **welcome** climbed a place in 2020, though these still remain an area of relative weakness ranking 15<sup>th</sup> and 18<sup>th</sup> respectively.

**Italy** holds very positive views of the UK overall though dropping two places to 4<sup>th</sup> in 2020 – only the second time the UK has slipped out of the top three from Italy. Tourism posted the lowest result to date falling four ranks to 7<sup>th</sup> – with the exception of **natural beauty** (a traditionally weak spot for the UK) all Tourism attributes lost ground this year. **Culture** too took a bit of a tumble (2 ranks) to 4<sup>th</sup>. **People** bucked the negative trend rising one rank to 7<sup>th</sup>, as did **welcome**, up 4 ranks to 13<sup>th</sup>.

**Russian** scores placed the UK 6<sup>th</sup> this year, an improvement of two ranks on the 2019 results. **Tourism** rose three ranks to 8<sup>th</sup> this year, with improvements noted for **historic buildings**, **visit if money was no object** and **natural beauty**. The UK retained 7<sup>th</sup> for **Culture** – for the third consecutive year. **People** (10<sup>th</sup>) gained further ground this year (11 rank places) after a few years of losses, though not reaching the record set in 2013. **Welcome**, an attribute not particular strong for the UK, gained three places this year but still remains in the bottom half of the league table at 35<sup>th</sup>.

Perceptions of the UK in **Egypt** are generally quite strong with the UK ranking 3<sup>rd</sup> overall in 2020 (up 3). There were significant improvements in both **natural beauty** and **welcome**, which both climbed 18 ranks each to claim 14<sup>th</sup> spot this year – with the later setting a new record. Records were also set for **historic buildings** in at 7<sup>th</sup> (up 5) and **contemporary culture** in 2<sup>nd</sup> place (up 4). **People** ranked 3<sup>rd</sup> (up seven places) another new record.

## Market rankings summary (3/4)

The **USA** is the UK's largest inbound market by both volume and value. With the exception of natural beauty the USA ranks the UK in the top five nations on all dimensions and attributes we focus on. The UK held 3<sup>rd</sup> rank overall and 3<sup>rd</sup> for **Tourism** in 2020. Within Tourism, **visit if money was no object** gained a place to a record matching 4<sup>th</sup>. **Culture** claimed 4<sup>th</sup> place in 2020 (down two ranks) – in fact all culture attributes were ranked 4<sup>th</sup> - **contemporary culture** and **sport** both lost a rank while **cultural heritage** held the 4<sup>th</sup> sport gained in 2019. **People** too claimed 4<sup>th</sup> place, down one rank from 2019, **welcome** also lost a place to finish in 5<sup>th</sup> in 2020.

The UK's NBI ranking from **Canada** returned to 2<sup>nd</sup> (up four ranks) in 2020 after a big fall in 2019 – which echoes results in most dimensions and attributes this year whereby ranks returned to or improved on pre 2019 levels. **Tourism** was 4<sup>th</sup> (up three ranks) with **visit if money was no object** securing a record 2<sup>nd</sup>, up seven places. **Culture** climbed two places to 5<sup>th</sup> while **People** ranked 3<sup>rd</sup> (up six ranks on 2019 results).

Views from **Brazil** were generous with the UK overall: up three ranks for the UK this year to a record 6<sup>th</sup>. Records were broken in each of the three dimensions we track. **Tourism** ranked a record equalling 9<sup>th</sup> in 2020 but it was the **historic buildings** attribute that set a new record of 7<sup>th</sup> (up three places). **Culture** held 8<sup>th</sup> rank for the third year in a row - the **sport** attribute broke into the top 10 for the first time in at 10<sup>th</sup> (up two ranks). The **People** dimension made it to 5<sup>th</sup>, up a massive eight ranks on 2019 results and a new record.

**Argentina** ranked the UK 9<sup>th</sup> in 2020, up one place compared to 2019 and equalling the previous high recorded in 2017. Across the three main dimensions, **Tourism** maintained the highest rank of 11<sup>th</sup> reached in 2019, while **Culture** rose three ranks to a record 6<sup>th</sup>; **People** was the biggest mover, raising seven ranks to a record smashing 14<sup>th</sup>.

## Market rankings summary (4/4)

Respondents from **China** ranked the UK a record equalling 1<sup>st</sup> place overall this year – the record previous reached in 2008. Generally China holds favourable views of the UK. For **Tourism** and **Culture** the UK holds 2<sup>nd</sup> place (both up 1 rank on the 2019 results). Within Tourism, **vibrant cities** set a new record in 1<sup>st</sup> place (up 2 ranks); within Culture, **contemporary culture** rose a rank to 2<sup>nd</sup>. **People**, a bright spot this year, rose four ranks to 1<sup>st</sup> place. (NB China is the only country in which respondents do not rate their own nation.)

The UK's overall rank from **India** held the 4<sup>th</sup> place in 2020 after reaching a record low of 5<sup>th</sup> in 2018. The UK has seen its rank for some of the key dimensions and attributes decrease this year, albeit from a high base – ranks for **Tourism** and **Culture** both fell two ranks to 4<sup>th</sup>. The **People** dimension bucked this negative trend, not only posting a rank rise, but setting a new record of 3<sup>rd</sup> in the process. **Welcome** posted spectacular results, rising 11 ranks to a record setting 4<sup>th</sup>.

After falling two places in 2018, the UK once again lost the place gained in 2019 to rank 4<sup>th</sup> overall from **Australia**. **Tourism** remained in 3<sup>rd</sup> place despite losing ranks for **historic buildings** (4<sup>th</sup>) and 2 ranks for **natural beauty** (16<sup>th</sup>). **Vibrant cities** gained a place to finished 2<sup>nd</sup>, while **visit if money was no object** held 4<sup>th</sup> for the seventh year in a row. **Culture** held its ground with a 2<sup>nd</sup> placing for the fourth year in a row. Overall the **People** dimension lost a rank, but still claimed 4<sup>th</sup> spot while **welcome** came in 4<sup>th</sup> for the sixth consecutive year.

**Japan**, a more mature Asian inbound market, ranked the UK 3<sup>rd</sup> overall, up two places on the 2019 NBI results but not quite a record. The UK was ranked 5<sup>th</sup> for both **Tourism** and **Culture** while **People** ranked 7<sup>th</sup> – all holding the ranks awarded in 2019. Most attributes held their 2019 rank or saw an increase this year. There was a noticeable rise for **natural beauty**, up eight places to 28<sup>th</sup>, along with **visit if money was no object** and **sport**, both rising two places to 5<sup>th</sup>. **Welcome** (18<sup>th</sup>) lost 3 rank places this year.

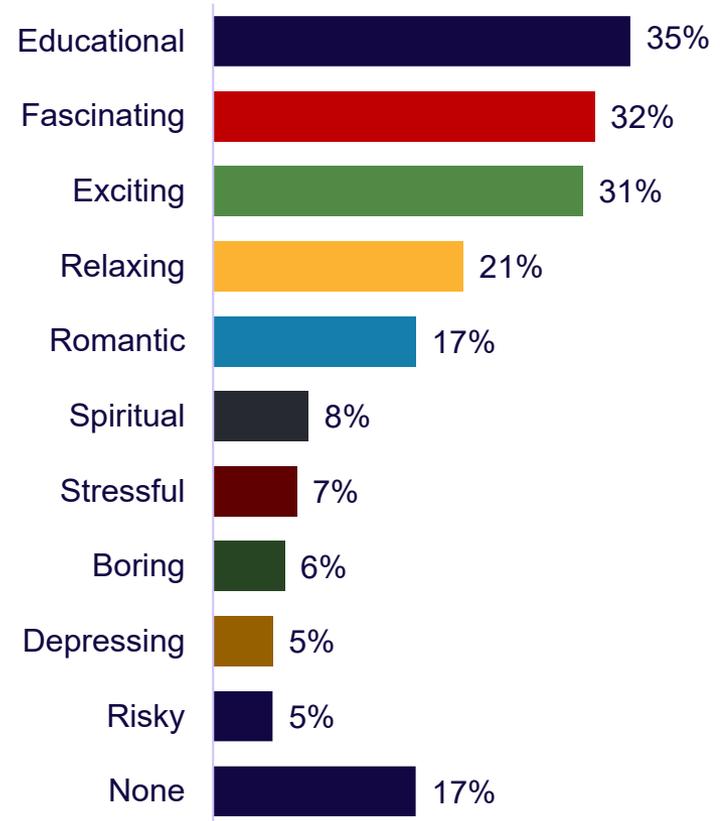


# Tourism and Culture associations

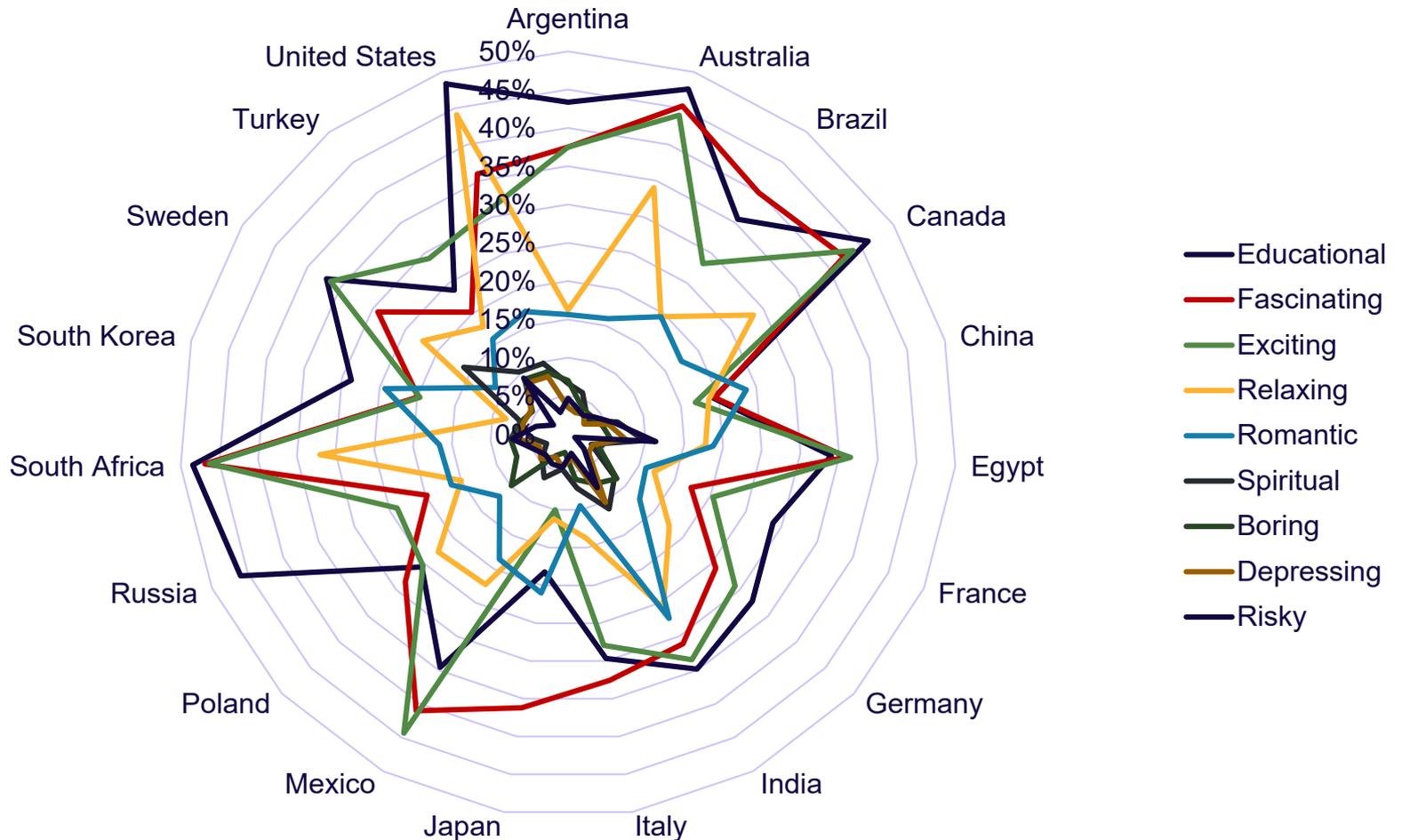
# Tourism word associations with the UK

The UK is most likely to be thought of as “educational” (35%) and this is likely to be a reflection of the rich history and culture for which the UK is ranked highly. The UK is also highly regarded in terms of offering world class study opportunities, and is ranked 2<sup>nd</sup> for being **a good place to study for educational opportunities**, which is the highest single attribute rank for the UK and has held 2<sup>nd</sup> since 2008.

In second and third places are “fascinating” and “exciting”, with little difference between the two. The UK is thought of as “fascinating” by many markets, but particularly Italy, Japan and Brazil, where it holds the strongest association. Egypt, Mexico and Turkey are more likely to think the UK is “exciting” than any other adjective.



# UK's tourism word associations by market



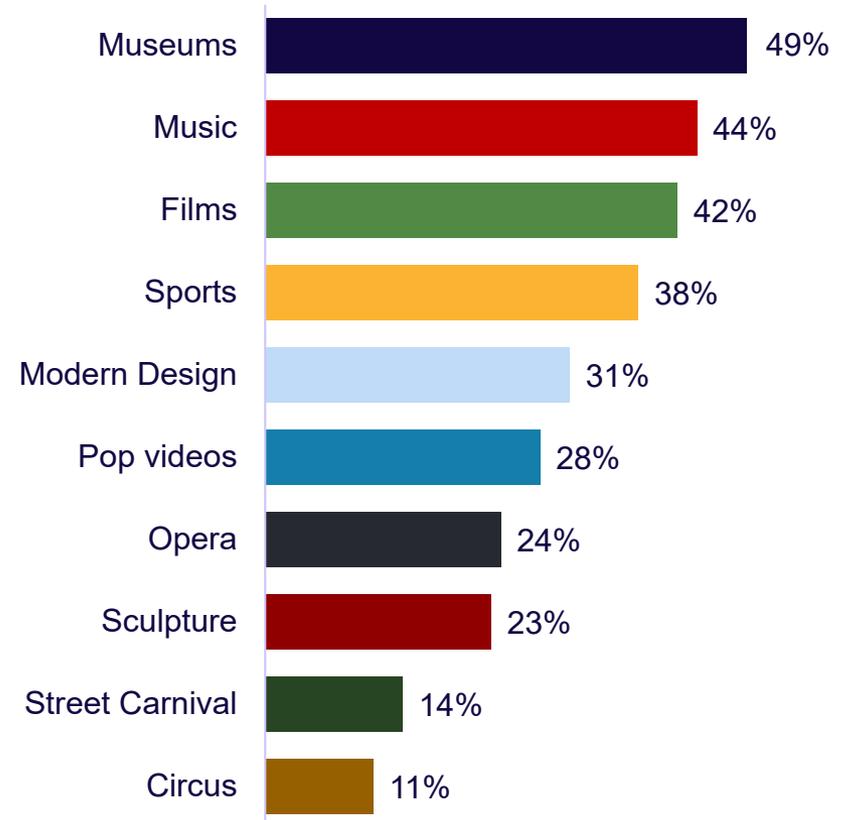
# Cultural products associated with the UK

Almost half of respondents associate the UK with museums. In particular museums take a leading role in Argentina, Australia, Brazil, Canada, France, Italy, Japan, Mexico, Russia, South Korea and the USA.

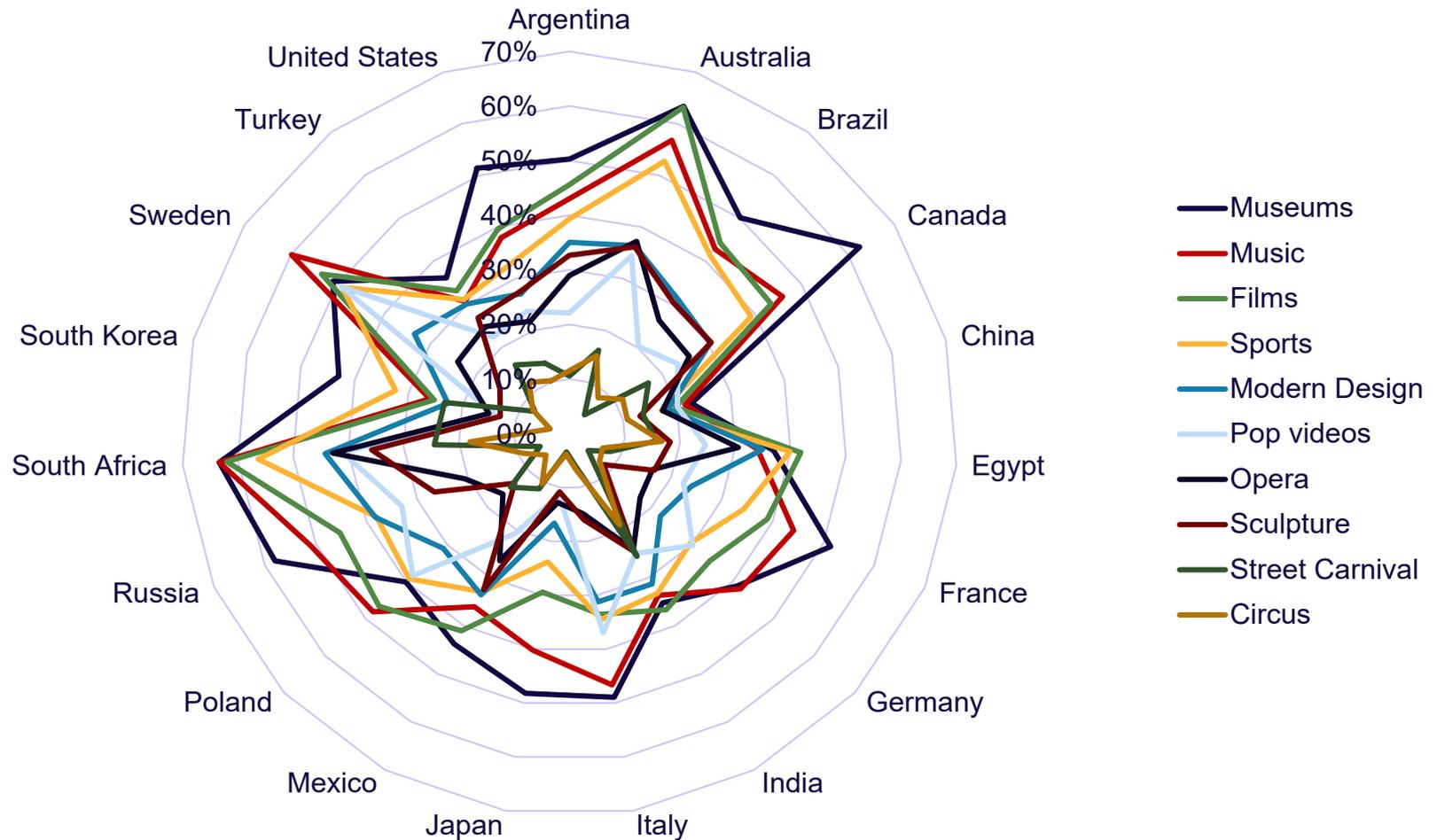
Music follows in terms of cultural associations with the UK. While most scores are very similar each year, 2019 saw music jump to 43% from 39% in 2018 – the proportion has held high in 2020 results.

Films come third for association with the UK. Both of those cultural products have a strong link to tourism and are drivers for visiting certain locations and regions around the UK.

Music is the UK's top cultural product in Sweden, while Egypt has the strongest associations of the UK with films.



# UK's cultural products associated by market





# Familiarity, favourability and past visitors

# UK rankings for familiarity and favourability

In total across all markets, the UK's average ranks for **Familiarity** and **Favourability** are similar to those seen in previous waves (down one to 4<sup>th</sup> and remaining in 5<sup>th</sup> respectively), but there have been some changes at the market level.

Positive changes in 2020 in favourability to the UK were from Russia, Japan, Turkey, Canada, Sweden, India and Argentina (up at least 4 ranks). All other markets saw a small increase or no change with the exception of Italy and Mexico where the UK lost a favourability rank place.

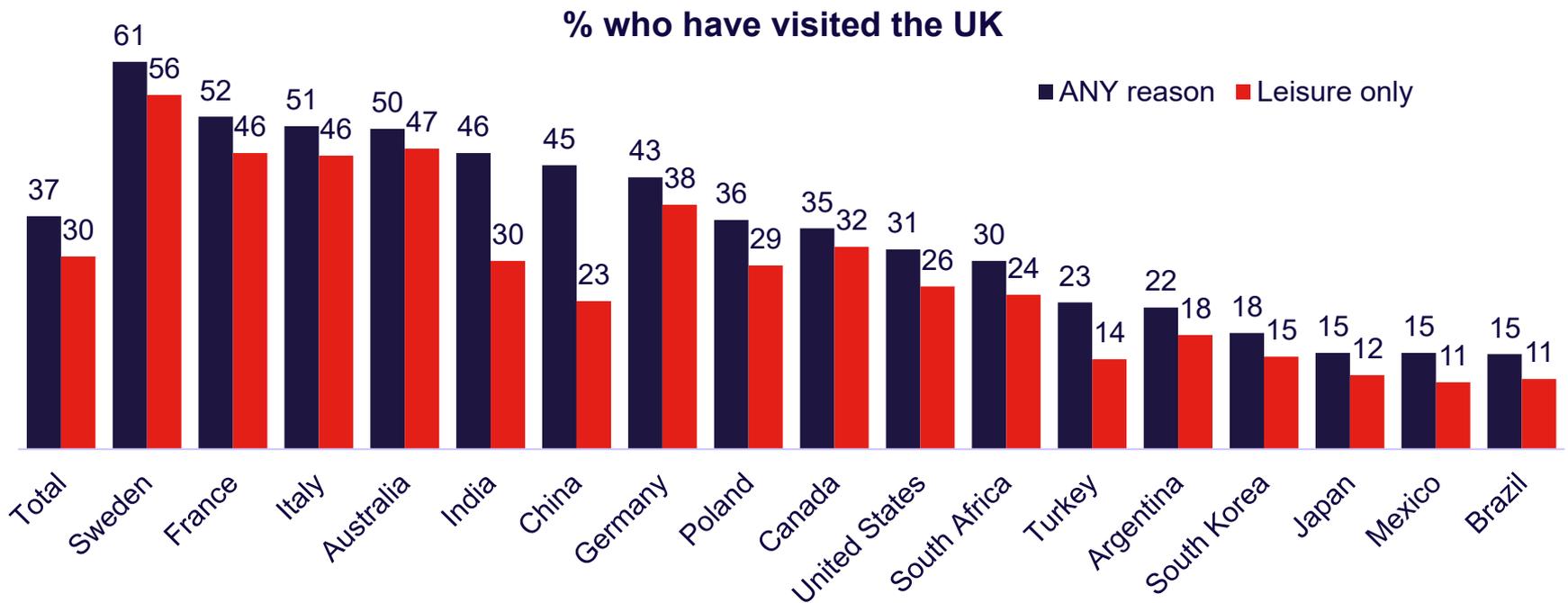
In terms of familiarity, Turkey, Japan, Canada, Argentina, France, Brazil and South Korea all promoted the UK at least one ranking place in 2020, though the ranking remains low for Turkey, Brazil and Argentina.

Sweden, India, Italy and Mexico demoted the UK's familiarity rank in 2020, but only by one / two places.

UK's rank from...	Favourability	Familiarity
South Africa	1	3
Canada	2	4
India	2	5
USA	3	3
Sweden	3	5
Japan	4	3
China	4	4
Australia	4	4
Italy	6	7
Poland	7	3
South Korea	8	5
Argentina	8	13
Mexico	9	17
Russia	12	10
Brazil	12	14
Turkey	13	13
France	14	4
Germany	21	9
<b>Total</b>	<b>5</b>	<b>4</b>

# 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 European neighbours; however, **Australia**, **India** and **China** also have a high proportion of visitors. **India**, **China** and **Poland** have a bigger gap between visitors for any reason and leisure visitors, likely to be driven by a larger number of VFR, study or business visits from these markets to the UK. **Turkey** also reported a large gap with fewer previously visiting the UK for holiday compared to those who have visited for any other reason.



Source: Anholt-Ipsos Nation Brands Index 2020. NB. Egypt not asked this question.

\*Ranks for 'Total' include the standard set of 20 panel countries

# Appendix

- An **online survey** was conducted among 20,019 consumers in 20 countries, with at least 1,000 respondents in each of the panel countries
- Fieldwork took place from **July-August 2020**, and was conducted in each market at the same time
- Respondents are representative of the online population in each market, and they are not necessarily international travellers
- The **20 panel countries** are: Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK & USA
- The **50 nations** that respondents in the 2020 survey were asked about were: Argentina, Australia, Austria, Belgium, Botswana, Brazil, Canada, Chile, China, Colombia, Czech Republic, Egypt, Finland, France, Germany, Greece, Holland, Hungary, India, Indonesia, Ireland, Italy, Japan, Kenya, Mexico, New Zealand, Nigeria, Northern Ireland, Norway, Panama, Peru, Poland, Qatar, Russia, Saudi Arabia, Scotland, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, Ukraine, United Arab Emirates, United Kingdom, United States, Wales

# UK's tourism word associations - data

TOURISM WORD	Educational	Fascinating	Exciting	Relaxing	Romantic	Spiritual	Stressful	Boring	Depressing	Risky
Argentina	43%	38%	38%	16%	16%	5%	7%	7%	4%	5%
Australia	48%	45%	44%	34%	16%	7%	6%	4%	3%	4%
Brazil	36%	40%	28%	19%	19%	8%	4%	4%	3%	3%
Canada	46%	42%	44%	28%	17%	5%	3%	4%	2%	4%
China	19%	19%	17%	19%	24%	20%	7%	5%	5%	6%
Egypt	34%	36%	36%	18%	19%	11%	10%	5%	7%	11%
France	29%	17%	20%	12%	11%	5%	3%	4%	3%	1%
Germany	32%	26%	29%	18%	13%	5%	8%	9%	4%	3%
India	35%	31%	33%	26%	27%	14%	11%	7%	10%	8%
Italy	30%	33%	28%	14%	9%	3%	7%	6%	3%	3%
Japan	18%	36%	10%	11%	21%	6%	5%	2%	4%	4%
Mexico	35%	41%	44%	22%	19%	8%	6%	3%	3%	4%
Poland	26%	28%	25%	23%	12%	6%	5%	10%	5%	4%
Russia	46%	20%	24%	15%	16%	13%	3%	7%	4%	5%
South Africa	48%	47%	46%	32%	17%	7%	5%	7%	6%	7%
South Korea	29%	20%	20%	8%	24%	11%	6%	6%	6%	4%
Sweden	37%	29%	37%	22%	11%	3%	16%	5%	6%	2%
Turkey	24%	20%	29%	18%	16%	15%	10%	9%	8%	9%
United States	48%	36%	31%	44%	17%	10%	10%	9%	8%	3%

# UK's cultural products - data

CULTURAL PRODUCTS	Museums	Music	Films	Sports	Modern Design	Pop videos	Opera	Sculpture	Street Carnival	Circus
Argentina	50%	43%	46%	39%	35%	22%	29%	33%	11%	12%
Australia	63%	57%	63%	53%	36%	34%	37%	36%	16%	15%
Brazil	50%	43%	44%	41%	32%	20%	26%	30%	4%	8%
Canada	63%	46%	43%	39%	30%	23%	26%	31%	17%	11%
China	23%	21%	20%	17%	18%	20%	17%	13%	14%	11%
Egypt	37%	34%	42%	40%	35%	25%	31%	18%	16%	17%
France	51%	44%	39%	34%	24%	22%	16%	17%	8%	7%
Germany	41%	42%	34%	30%	22%	30%	17%	8%	5%	7%
India	35%	34%	37%	33%	31%	25%	24%	25%	26%	19%
Italy	49%	47%	34%	34%	31%	37%	15%	16%	6%	7%
Japan	48%	40%	29%	24%	17%	11%	13%	11%	3%	4%
Mexico	44%	36%	41%	33%	34%	21%	26%	33%	11%	10%
Poland	40%	48%	47%	39%	31%	38%	16%	13%	14%	6%
Russia	58%	51%	45%	38%	38%	33%	21%	27%	6%	9%
South Africa	63%	63%	62%	56%	44%	41%	43%	36%	24%	18%
South Korea	43%	26%	25%	32%	23%	14%	15%	13%	23%	4%
Sweden	51%	60%	53%	49%	33%	49%	24%	15%	7%	8%
Turkey	36%	31%	33%	31%	30%	22%	25%	27%	16%	12%
United States	51%	38%	40%	33%	27%	24%	22%	28%	14%	10%