

How the world views the UK – 2021

Foresight 181

VisitBritain Research

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Introduction, study details and context

Introduction

This edition of Foresight is a summary of the key UK findings from the 2021 Anholt-Ipsos Nation Brands Index survey, conducted between 6th July and 13th August 2021. 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 60,000 consumers in 20 panel countries around the world. Respondents score 60 nations (including the UK) on a raft of attributes including some relating to tourism, culture and people 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, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, Saudi Arabia, 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 People) 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 2020 and 2021 and will take a brief look at demographic differences. And to put the results in context of tourism we'll also take a deep dive into the effect of previous visitation on ranking and scores. To close, we'll explore familiarity and favourability by markets, before investigating the UK's tourism and cultural word associations for all 20 markets.

Note: there were some methodological changes to the 2021 survey: the removal of Egypt from the panel countries and the addition of Saudi Arabia; tripled interviews from 20,000 to 60,000; and a ranking of 60 nations (vs 50 the previous year).*

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. We concentrate on the UK’s ranking in this report, except for slides 25-26 and 33-34 where we look at scores.

For reasons of space we have not shown the long term trends for each market that fieldwork is conducted in; please contact VisitBritain Research if you have a specific question about this.

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.

Please note that ranks and averages for ‘all markets’ include the standard set of 20 panel countries

Context: holiday visits from NBI markets

The latest data available to illustrate a 'normal' year is from the International Passenger Survey in 2019. During 2019, there were over 9.7 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 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 and higher spending markets like Saudi Arabia.

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	% of all holiday visits to the UK
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%
Saudi Arabia	139	0.8%
Argentina	92	0.5%
Russia	80	0.5%
Turkey	80	0.5%
South Africa	55	0.3%
TOTAL	9,699	57.40%

2019 holiday spend to the UK from	Value in £m	% of all holiday spend to the UK
USA	2,200	16.5%
Germany	863	6.5%
China	834	6.3%
France	719	5.4%
Italy	638	4.8%
Australia	495	3.7%
Saudi Arabia	440	3.3%
Canada	343	2.6%
Sweden	193	1.5%
Japan	190	1.4%
Brazil	176	1.3%
South Korea	169	1.3%
India	156	1.2%
Poland	127	1.0%
Russia	76	0.6%
Turkey	75	0.6%
Mexico	74	0.6%
Argentina	57	0.4%
South Africa	52	0.4%
TOTAL	7,877	59.04%

Source: International Passenger Survey, ONS, 2019. "Total" above includes all 19 markets although elsewhere in the report Total includes the 20 standard NBI markets.



Headline findings

Headline summary

- The **UK was ranked 5th in 2021 out of 60 nations**. Germany held 1st place, as it has done since 2017, whilst Canada, Japan and Italy gained ranks to the top 5, pushing the UK down three ranks from 2nd place in 2020.
- The UK saw rank decreases across many of the dimensions when compared to 2020:
 - › **Tourism** dropped two ranks to a record low of 6th place
 - › **Culture** fell one rank, claiming 4th place
 - › **People** saw a significant drop in ranking of six places to 10th place
 - › **Exports** maintained its 2020 rank of 4th place
 - › **Immigration/investment** dropped one rank to 5th
 - › **Governance** score the lowest at 11th, dropping one place in 2021
- Looking at the Tourism dimension, **historic buildings** retained its 5th position whilst **visiting if money were no object** dropped two places to 7th. Vibrant cities lost its consistent 4th rank to 6th place. **Natural beauty** has historically been a weakness for the UK but a record low of 31st rank was seen in 2021.
- Within the Culture dimension, **contemporary culture** held its strong rank of 4th whilst **excelling at sport** dropped one place and **cultural heritage** dropped to a record low of 8th place.
- The rank for People fell to a record low as did **Welcome** which came in at 18th place. **Having a person from the UK as a close friend** remained 3rd whilst **employing a qualified person from the UK** fell three places to 6th after setting a record in 2020.
- There was a rise in our overall NBI ranking from three countries. There were four countries where the UK retained its 2020 rank whilst the ranking deteriorated in thirteen countries.
- We have found no evidence that these declines were due to methodological changes. At the total level, and for some markets and attributes in particular, the declines in ranks are underlined by the decline in the UK's relative score.

Top ten nation brands 2021

There were significant changes to the top 10 nation brands in 2021. The **UK** dropped 3 rankings in the top 10 to a record low of 5th place, despite a +1.93 points increase; all other countries in the top ten saw a bigger increase in score so the UK's competitive position worsened.

France also saw a score increase but lost a ranking settling in at 6th place.

Germany had one of the smallest score increases but continued to hold first place for the 5th year in a row.

Canada and **Japan** remained in the top 5, jumping up one place each in 2021 whilst **Italy** gained two ranks with a score increase of +3.12 points.

The **US** saw some recovery from previous years with the largest score increase in 2021, up +4.00 and jumping to 8th place. **Sweden** saw the second largest score increase of +3.21 points but dropped one ranking.

Rank	Nation	Change vs 2020
1	Germany	0
2	Canada	+1
3	Japan	+1
4	Italy	+2
5	United Kingdom	-3
6	France	-1
7	Switzerland	0
8	United States	+2
9	Sweden	-1
10	Australia	-1

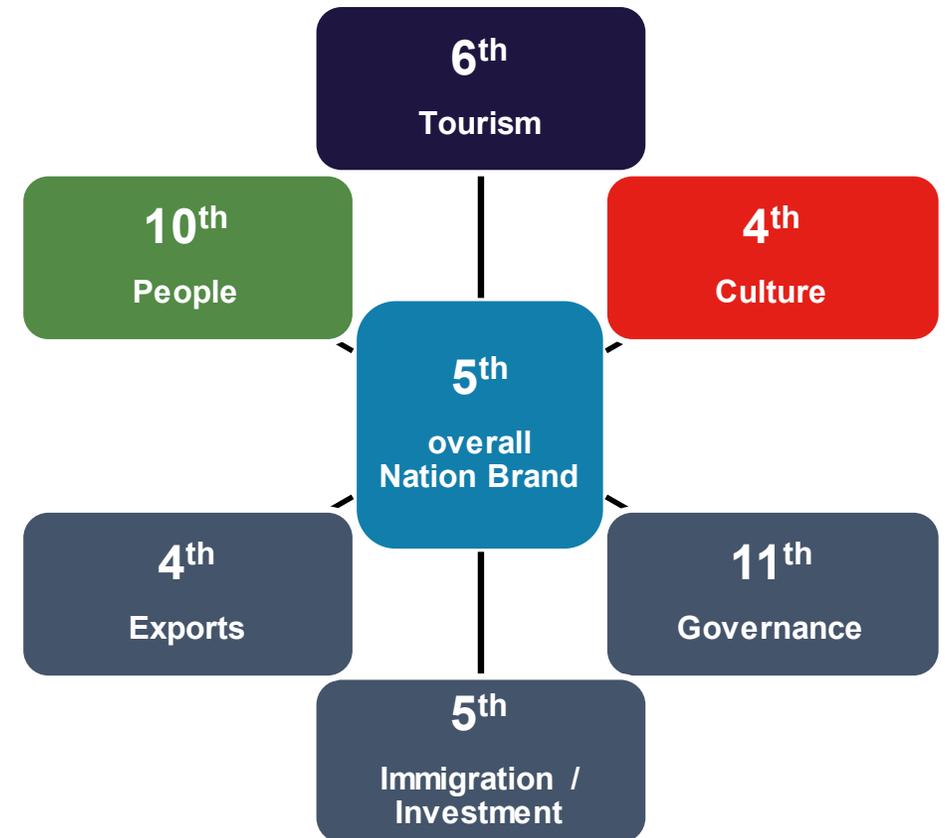
How the UK ranks in 2021

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 for 2021** are those for **educational qualifications, contemporary culture, sport, historic buildings and monuments** and **vibrant city life/urban attractions**.

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**. Attributes such as rich in **natural beauty, welcome** and **behaving responsibly to protect the environment** are ranked the lowest for the UK in 2021.

Further analysis to decipher whether the change in panel countries in 2021 contributed to the UK's decline showed that if Saudi Arabia was removed as a panel country, the UK would still have seen very similar declines in ranking. Whilst the UK did not necessarily see many score decreases among panel countries, they did not see as big of a score increase as the rest of the top nations.



UK ranking for NBI dimensions and attributes (1)

Tourism dropped two ranks to a record low of 6th in 2021. Within the tourism dimension, historic buildings maintained its rank of 5th but a place to visit if money was no object and vibrant city life dropped two ranks each. Natural Beauty remained a strong weakness for the UK, reaching a record low of 31st rank.

The UK's **Culture** fell one rank, claiming 4th. Contemporary culture and sports both took 4th with some of the highest UK ranks of 2021. Rich cultural heritage dropped to 8th place, a record low.

The UK's ranking for **People** saw a substantial drop to a record low of 10th. After a strong 2020, Welcome dropped 7 ranks to 18th in 2021. Having a close friend from the UK retained its 2020 rank whilst employing a well-qualified person from the UK dropped 3 ranks to a record low of 6th.

Hexagon dimension / attribute	UK rank in 2021	Change to 2020
TOURISM	6	-2
Rich in historic buildings & monuments	5	-
Vibrant city life & urban attractions	6	-2
Would like to visit if money was no object	7	-2
Rich in natural beauty	31	-8
CULTURE	4	-1
Interesting & exciting for contemporary culture	4	-
Excels at sport	4	-1
Has a rich cultural heritage	8	-2
PEOPLE	10	-6
If visited, people would make me feel very welcome	18	-7
Would like a person from country as a close friend	3	0
Would employ well-qualified person from country	6	-3

UK ranking for NBI dimensions and attributes (2)

The UK's ranking for **Exports** has retained 4th. The UK as a major contributor to innovation in science and technology retained its 5th rank whilst the other two attributes within Exports lost two ranks, both at 6th place.

Immigration and Investment dropped one rank to 5th. The UK as a good place to study for educational qualifications and having businesses to invest in retained their 2020 rankings. All other attributes lost 2-3 ranks.

The **Governance** dimension also lost one rank to 11th place. Ranks were maintained for respecting citizens and treating them with fairness, and for competently and honestly governing. Behaving responsibly in international peace and security was the only attribute to gain a rank in 2021 whilst behaving responsibly to protect the environment and help reduce world poverty both lost two ranks.

Hexagon dimension / attribute	UK rank in 2021	Change to 2020
EXPORTS	4	0
Major contributor to innovation in science & tech.	5	0
Feel better about buying product if made there	6	-2
Creative, cutting-edge ideas & new ways of thinking	6	-2
IMMIGRATION-INVESTMENT	5	-1
Willing to live & work there for substantial period	5	-2
A place with a high quality of life	8	-3
A good place to study for educational qualifications	2	0
Has businesses I'd like to invest in	6	0
Cares about equality in society	12	-2
GOVERNANCE	11	-1
Competently & honestly governed	11	0
Respects the rights of citizens & treats with fairness	10	0
Behaves responsibly in int. peace & security	9	1
Behaves responsibly to protect the environment	15	-2
Behaves responsibly to help reduce world poverty	10	-2



Tourism, Culture and Welcome rankings

UK ranking for Tourism, Culture and Welcome attributes - overall

The below table shows the UK's ranking across selected dimensions and attributes from 2008 to 2021.

Dimension / Attributes ranks in 2021 vs 2020	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
OVERALL NBI	3	4	4	3	3	3	3	3	3	3	3	4	2	5
TOURISM	4	5	5	4	4	4	3	4	5	3	4	4	4	6
Is rich in historic buildings and monuments	4	4	4	4	5	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	6
Would like to visit if money was no object	7	8	8	6	6	6	5	6	5	6	5	6	5	7
Is rich in natural beauty	23	24	22	22	22	20	20	18	24	24	24	26	23	31
CULTURE	3	4	6	4	4	4	5	5	5	5	4	5	3	4
Interesting & exciting contemporary culture	4	4	4	4	3	3	3	3	4	3	4	3	4	4
Excels at sport	7	8	8	5	6	5	4	4	5	4	5	5	3	4
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7	7	7	7	6	8
PEOPLE	6	6	6	4	4	4	4	5	7	6	6	7	4	10
If visited, people would make me feel very welcome	14	13	13	12	13	10	13	11	12	13	15	16	11	18
RANK FOR FAVOURABILITY	4	6	4	4	3	4	6	4	6	6	5	5	5	8
RANK FOR FAMILIARITY	5	5	5	5	5	4	5	5	3	3	3	3	4	3

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

UK ranking changes for Tourism, Culture and Welcome attributes - overall

The below table shows the UK's change in ranking across selected dimensions and attributes from 2008 to 2021. In 2021, Natural Beauty, People and Welcome saw significant decreases in rank.

Dimension / Attributes rank change for 2021 vs 2020	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
OVERALL NBI	-1	0	1	0	0	0	0	0	0	0	-1	2	-3
TOURISM	-1	0	1	0	0	1	-1	-1	2	-1	0	0	-2
Is rich in historic buildings and monuments	0	0	0	-1	0	0	0	0	0	0	0	0	0
Has a vibrant city life and urban attractions	0	0	0	0	0	0	0	0	0	0	0	0	-2
Would like to visit if money was no object	-1	0	2	0	0	1	-1	1	-1	1	-1	1	-2
Is rich in natural beauty	-1	2	0	0	2	0	2	-6	0	0	-2	3	-8
CULTURE	-1	-2	2	0	0	-1	0	0	0	1	-1	2	-1
Interesting & exciting contemporary culture	0	0	0	1	0	0	0	-1	1	-1	1	-1	0
Excels at sport	-1	0	3	-1	1	1	0	-1	1	-1	0	2	-1
Has a rich cultural heritage	-1	0	0	0	0	0	1	-1	0	0	0	1	-2
PEOPLE	0	0	2	0	0	0	-1	-2	1	0	-1	3	-6
If visited, people would make me feel very welcome	1	0	1	-1	3	-3	2	-1	-1	-2	-1	5	-7
CHANGE IN FAVOURABILITY	-2	2	0	1	-1	-2	2	-2	0	1	0	0	-3
CHANGE IN FAMILIARITY	0	0	0	0	1	-1	0	2	0	0	0	-1	1

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

Tourism ranking

The UK's rank for **Tourism** dropped two ranks in 2021 to a record low of 6th place.

There were no changes in the UK's rank for **historic buildings and monuments** – a historically strong attribute for the UK. **Vibrant city life** had remained at 4th place since the NBI began in 2008 but dropped two places in 2021 despite a score increase, with two close markets jumping ahead with slightly larger score increases.

A place to visit if money was no object dropped two ranks, driven by a larger score increase for other markets.

Natural beauty has continually been a weak attribute for the UK and despite improvements in 2020, this attribute dropped eight ranks to a record low of 31st place in 2021.

TOURISM dimension and attributes	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Overall	4	5	5	4	4	4	3	4	5	3	4	4	4	6
Is rich in historic buildings and monuments	4	4	4	4	5	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	6
Would like to visit if money was no object	7	8	8	6	6	6	5	6	5	6	5	6	5	7
Is rich in natural beauty	23	24	22	22	22	20	20	18	24	24	24	26	23	31

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

Culture ranking

The UK's overall ranking for the **Culture** dimension fell one place in 2021 to 4th place though still well within its usual range.

Contemporary culture remained one of the strongest attributes for the UK, retaining 4th rank.

Perceptions that the UK **excels at sports** has had a noticeable shift in rank since 2011 and ranked the highest in 2020 at 3rd place. In 2021, it dropped one rank to 4th.

The UK's **cultural heritage** fell two places in 2021 to a record low of 8th place after making a strong 6th place in 2020. However, its score was not far behind the nations in 6th and 7th place.

CULTURE dimension and attributes	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Overall	3	4	6	4	4	4	5	5	5	5	4	5	3	4
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	4
Excels at sport	7	8	8	5	6	5	4	4	5	4	5	5	3	4
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7	7	7	7	6	8

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

People and Welcome ranking

Perceptions of the UK's People has been fluctuating between 4th and 7th rank since 2008. After holding 4th rank in 2020, the **People** dimension fell to 10th in 2021, a record low. Whilst we recognise these declines, the UK's ranking for People is still performing relatively well at 10th of out 60 nations.

The overall ranking of the UK's welcome attribute is the 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 fell to a record low in 2020 to 18th place. 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	2021
Overall	6	6	6	4	4	4	4	5	7	6	6	7	4	10
If visited, the people would make me feel very welcome	14	13	13	12	13	10	13	11	12	13	15	16	11	18

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

UK ranking for Tourism, Culture and Welcome attributes – by market

The below table shows the UK's ranking across the 20 panel markets across selected dimensions and attributes in 2021.

Dimension / Attributes ranks in 2021	Total	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	Saudi Arabia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	5	8	3	6	8	10	12	19	6	7	4	5	5	7	14	1	5	6	13	1	3
TOURISM	6	10	3	8	9	19	11	17	5	7	7	9	9	10	29	4	5	6	14	1	4
Is rich in historic buildings and monuments	5	6	3	7	6	11	6	12	4	8	7	10	7	6	29	5	7	7	9	1	5
Has a vibrant city life and urban attractions	6	6	5	6	7	10	5	7	5	5	4	11	6	7	27	2	5	3	17	1	4
Would like to visit if money was no object	7	10	5	6	9	19	20	18	5	12	10	8	14	12	19	3	4	7	21	1	4
Is rich in natural beauty	31	38	18	35	22	34	40	42	30	38	25	18	49	47	38	39	21	30	29	7	20
CULTURE	4	6	5	8	6	7	4	6	6	5	3	8	4	8	17	3	3	4	7	1	6
Interesting & exciting contemporary culture	4	5	2	8	6	4	4	4	4	5	3	5	4	6	7	3	4	4	7	1	4
Excels at sport	4	8	4	9	7	9	6	7	11	5	7	6	7	9	17	3	3	6	9	2	4
Has a rich cultural heritage	8	9	10	13	7	14	7	14	7	7	7	12	7	10	24	19	6	10	8	1	8
PEOPLE	10	17	4	10	13	27	23	23	9	13	9	6	13	18	19	2	5	7	18	1	5
If visited, people would make me feel very welcome	18	26	5	17	11	34	28	39	11	24	19	17	23	39	34	16	20	14	38	3	6
RANK FOR FAVOURABILITY	8	9	5	5	8	17	20	20	2	16	10	6	13	13	16	1	7	8	18	1	6
RANK FOR FAMILIARITY	3	11	4	12	7	5	4	9	5	5	5	13	2	3	8	3	5	3	25	1	3

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

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

The below table shows the UK's change in ranking across selected dimensions and attributes from 2020 to 2021. Large decreases in rank were seen from China, Canada, France and Italy.

Dimension / Attributes rank change for 2021 vs 2020	Total	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	-3	1	1	0	-6	-9	-4	-2	-2	-3	-1	3	-2	-1	0	-1	-2	-1	0	0
TOURISM	-2	1	0	1	-5	-17	-2	-2	-1	0	-2	0	0	-2	-1	2	-2	-1	0	-1
Is rich in historic buildings and monuments	0	3	1	0	-1	-8	1	-6	-1	-2	-1	-2	0	-1	-2	0	-1	-1	0	-1
Has a vibrant city life and urban attractions	-2	1	-3	2	-1	-9	0	0	-2	-1	-1	-4	0	1	0	-1	-2	-5	0	-1
Would like to visit if money was no object	-2	3	-1	6	-7	-9	-6	-2	1	-4	-5	2	-6	-4	1	1	-4	-2	0	0
Is rich in natural beauty	-8	-9	-2	-10	-5	-24	-9	-10	-23	-7	3	5	-8	-13	-6	-3	-7	2	-3	-4
CULTURE	-1	0	-3	0	-1	-5	0	-1	-2	-1	2	2	0	-1	-2	0	0	0	0	-2
Interesting & exciting contemporary culture	0	1	0	-2	-2	-2	0	0	-1	-2	1	2	-2	1	-1	0	-1	0	0	0
Excels at sport	-1	1	-1	1	-2	-4	-1	0	-3	2	-2	5	0	-2	1	0	-1	0	0	0
Has a rich cultural heritage	-2	2	-4	-2	-2	-10	0	-5	-4	0	-1	1	1	-2	-5	0	-1	-2	0	-4
PEOPLE	-6	-3	0	-5	-10	-26	-8	-5	-6	-6	-2	5	-2	-8	2	4	-1	-1	0	-1
If visited, people would make me feel very welcome	-7	0	-1	-4	-6	-27	-10	-18	-7	-11	-1	2	-4	-4	-9	2	-6	2	1	-1
CHANGE IN FAVOURABILITY	-3	-1	-1	7	-6	-13	-6	1	0	-10	-6	3	-6	-1	0	1	-5	-5	0	-3
CHANGE IN FAMILIARITY	1	2	0	2	-3	-1	0	0	0	2	-2	4	1	7	0	0	2	-12	0	0

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

Market rankings (1)

France is the UK's largest European source market, and the second largest globally by volume of visits. The UK lost four places in 2021, down to 12th in the overall ranking, a record low. Overall, **Tourism** dropped two ranks to 11th with historic buildings gaining one place (6th) and vibrant cities maintaining 5th place. However, visiting if money was no object and natural beauty dropped 6 and 9 ranks respectively. All the attributes within Culture maintained their 2020 ranks with only sport dropping one rank to 6th. The People dimension dropped a significant 8 places to 23rd with Welcome dropping 10 places to 28th, a record low and area of weakness for the UK.

The UK's NBI ranking from **Germany** fell further by two ranks in 2021 – the sixth year of consecutive decreases. The UK now ranks 19th overall, the lowest rank from any nation on the UK's overall NBI. Across the dimensions and attributes we usually track, no attributes saw a rank rise. Tourism fell two ranks to 17th with historic buildings and natural beauty reaching record low ranks of 12th and 42nd place respectively. Despite contemporary culture and sport retaining 2020 ranks, the Culture dimension lost one rank to 6th place with cultural heritage dropping five ranks to a record low at 14th place. Welcome was a particular weakness for the UK in 2021, dropping eighteen places to 39th for Germany.

Italy has historically held a positive view of the UK overall but 2021 saw a decline in three places to 7th, a record low. Despite a drop in rankings across attributes within Tourism, the overall dimension retained 7th place. Culture dropped one rank to 5th with cultural heritage retaining 7th place but contemporary culture and sport dropping two places each. People dropped to 13th with Welcome dropping eleven places to 24th place, another record low.

Overall perceptions of the UK from **Poland** fell two places to 5th in 2021. Visiting if money was no object dropped to 14th and natural beauty dropped to 49th whilst historic buildings and vibrant cities retained their 2020 rank within the top 10. Culture retained its 4th rank with all attributes within remaining in the top 7 – cultural heritage was the only attribute to gain a rank, to 7th place. People and Welcome dropped a few ranks in 2021 but not to record lows.

Russia scored the UK 7th overall, down one rank on 2020. Vibrant cities and contemporary culture were the only two attributes to gain one place in 2020 whilst all other attributes saw declines of one to four places, apart from natural beauty which dropped thirteen places to 47th.

Market rankings (2)

The UK's overall ranking from **Sweden** dropped two places to 6th breaking a rank of 4th which was held from 2017 to 2020. Tourism fell two places to 6th. Historic buildings lost one rank to 7th whilst vibrant cities lost two ranks to 3rd after reaching first place in 2020. Culture retained 4th place but all attributes dropped one rank each. People fell one rank with Welcome dropping to 14th, both at record lows.

Turkey dropped one rank to 13th after the UK gained it's highest rank in 2020. Tourism lost one ranking and whilst attributes within did drop they were not close to record lows. Culture retained 7th place and all attributes within remained in the top 10. Whilst both scores remained relatively low, natural beauty and welcome both gained two ranks to new records.

This was the first year **Saudi Arabia** was included on the panel countries and it ranked the UK 14th overall. It ranked the UK relatively low on most attributes – particularly those within the Tourism dimension where all attributes were ranked below 19th place. Culture took 17th place whilst contemporary culture took 7th (the highest rank for the UK from this market), sport took 17th and cultural heritage ranked 24th. People came in at 19th with Welcome at 34th place. Natural beauty was ranked the lowest at 38th place.

South Africa ranked the UK 1st overall, as it has done for the past four years. There were some drops in rank but all attributes remained in the top five apart from natural beauty (39th), cultural heritage (19th) and Welcome (16th).

After retaining 4th place for two years, **India's** rank for the UK fell two places to 6th. Tourism ranked 5th as did vibrant cities whilst historic buildings dropped to 4th place. Visiting if money was no object was the only attribute to gain a rank to 5th place. Natural beauty has ranked 7th for the past two years but dropped dramatically twenty three places to 30th in 2021. Culture fell two places to 6th whilst all attributes fell within the dimension. People had retained a higher score over the past two years but dropped to 9th in 2021. Within this, Welcome dropped seven places to 11th, although this was higher than ranks held in 2018 and 2019.

Market rankings (3)

Australia was amongst the only countries to rank the UK higher in 2021 vs 2020, with an overall NBI of 3rd. Tourism remained in 3rd place whilst historic buildings gained one rank to 3rd. Vibrant cities and visiting if money was no object both dropped to 5th place, record lows for these attributes. Natural beauty dropped a couple of places to 18th drawing with the record low in 2018. Culture dropped to 5th after 4 years of retaining 2nd place. Sport also dropped one rank whilst cultural heritage fell to 10th place, a record low. People held its ground at 4th whilst Welcome ranked 5th, dropping one place after six years of holding 4th.

Respondents from **China** had ranked the UK a record equalling 1st place in 2020 but 2021 saw a significant drop in ranking to 10th. Historically, China had consistency held favourable views of the UK but all attributes saw a dramatic fall in 2021. Tourism dropped seventeen places to 19th with visiting if money was no object fell to 19th. Historic buildings and vibrant cities fell a few places to 11th and 10th respectively. Natural beauty and Welcome fell the most places to 34th. People had held 1st place in 2020 but fell to 27th in 2021. Sport fell to 9th place and cultural heritage dropped ten places to 14th whilst contemporary culture received the highest rank at 4th.

Japan holds the UK in high regard ranking the UK 4th in 2021, down one place on 2020. Tourism fell a couple of places to 7th after retaining 5th for the two years previous. Historic buildings and vibrant cities also saw a decrease in rankings. Although still a relative weakness for the UK, natural beauty rose 3 places to 25th. Culture was up two places to 3rd – equal to the record set in 2008. Within this dimension contemporary culture also rose one spot to 3rd, the highest rank since 2015. Sport and Cultural Heritage fell a few ranks, both ranking the UK at 7th. People fell two places to a record low of 9th whilst Welcome also dropped to 19th place.

South Korea has consistently ranked the UK high since 2008 and fell just one place to 5th in 2021. Tourism gained two places to 5th whilst visiting if money was no object also rose to 4th place. Vibrant cities lost one rank but still remained within the top 5. Natural beauty remained a weakness and dropped three ranks to 21st. Culture, and all the attributes within this dimension, maintained ranks from 2021, all within the top 6. People was ranked 5th, rising four places in one year, whilst Welcome also rose two places but retained a relatively low ranking of 20th place.

Market rankings (4)

Argentina ranked the UK a record 8th in 2021, up one place on 2020. Tourism rose one rank to 10th whilst Culture maintained 6th. Most other attributes rose in ranking setting new records for historic buildings, vibrant cities and visiting if money was no object. Low ranks were seen for natural beauty which fell nine places to 38th and People, which fell three places to 17th. Welcome remained stable at 26th.

The UK's overall NBI from **Brazil** remained at 6th. Tourism set a new record at 8th as did vibrant cities and visiting if money was no object, both rising to 6th place. Historic buildings maintained 7th place. Culture remained at 8th for the fourth year in a row whilst contemporary culture and cultural heritage both dropped a couple of ranks to 8th and 13th respectively. People ranked a record 5th in 2020 but moved down to 10th in 2021 with Welcome also seeing a drop to 17th.

Canada saw its greatest fall in ranking in 2021 to 8th place after gaining back 2nd in 2020 with decreases across the board. Tourism fell to 9th and Culture fell to 6th but despite all accompanying attributes decreasing they did remain within the top 10. Natural beauty was the exception in these dimensions, falling to a record low to 22nd place. People fell ten ranks to 13th whilst Welcome fell six places to 11th.

The highest rise in ranking in 2021 came from **Mexico** who rated the UK 5th, up three places on 2020. Tourism retained 9th place with historic buildings and vibrant cities dropping a few places but all other attributes rising in rank. Natural beauty, sport and People all set records in 2021.

The US is the UK's largest inbound market for both volume and value. The UK retained its 3rd rank from the US, in line with the past three years. With the exception of natural beauty the UK is ranked in the top 10 nations on all dimensions and attributes we focus on. Vibrant cities, visiting if money was no object, contemporary culture and sport were ranked the highest at 4th. Historic buildings took 5th whilst cultural heritage dropped from 4th to 8th place. People and Welcome dropped one rank to 5th and 6th respectively with the latter being one of the highest ranks for People across panel countries. Natural beauty remained a weakness losing two ranks to 20th place.

UK changes in relative score for Tourism, Culture and Welcome attributes – by market

Numbers show the change in the UK's normalised score relative to the average score given to all nations between 2020 and 2021. Calculated amongst the 50 nations common to both 2020 and 2021 NBI surveys.

Change in the UK's normalised score relative to the average score for 50 nations	Total	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	-0.18	0.08	-0.07	-0.08	-0.32	-1.60	-0.14	-0.05	-0.31	-0.19	-0.08	0.04	-0.09	-0.20	-0.15	0.01	-0.13	-0.07	-0.12	-0.13
TOURISM	-0.20	0.12	-0.13	0.08	-0.42	-1.34	-0.03	-0.17	-0.34	-0.16	-0.14	-0.08	-0.16	-0.21	-0.11	0.06	-0.18	0.01	-0.23	-0.13
Is rich in historic buildings and monuments	-0.15	0.28	-0.04	0.06	-0.50	-1.64	0.16	-0.18	-0.12	-0.13	-0.30	-0.16	-0.12	-0.07	-0.13	0.29	-0.10	-0.11	-0.32	-0.09
Has a vibrant city life and urban attractions	-0.20	0.17	-0.29	0.04	-0.40	-1.69	0.08	-0.16	-0.33	-0.27	-0.30	-0.29	0.03	-0.10	-0.29	-0.13	-0.21	0.01	-0.21	-0.13
Would like to visit if money was no object	-0.15	0.06	-0.09	0.24	-0.31	-0.66	-0.16	-0.04	-0.02	-0.13	-0.07	0.01	-0.31	-0.27	-0.08	0.03	-0.14	0.04	-0.23	-0.12
Is rich in natural beauty	-0.26	-0.19	-0.07	-0.38	-0.30	-0.75	-0.24	-0.25	-1.08	-0.25	0.25	0.26	0.10	-0.38	-0.06	0.07	-0.30	0.17	-0.22	-0.20
CULTURE	-0.19	0.04	-0.36	-0.01	-0.33	-1.80	-0.13	-0.09	-0.17	-0.19	-0.18	0.34	-0.07	-0.14	-0.22	-0.01	-0.15	-0.18	-0.29	-0.07
Interesting & exciting contemporary culture	-0.22	0.02	-0.37	-0.25	-0.42	-1.69	-0.21	-0.18	-0.19	-0.11	0.03	0.26	-0.34	-0.26	-0.43	-0.10	-0.15	-0.20	-0.33	-0.08
Excels at sport	-0.04	0.10	-0.18	0.34	-0.10	-1.22	-0.11	0.16	-0.17	-0.07	-0.17	0.36	-0.02	0.03	-0.02	-0.08	-0.09	-0.06	-0.20	0.04
Has a rich cultural heritage	-0.25	-0.07	-0.51	-0.37	-0.41	-1.59	0.01	-0.28	-0.20	-0.39	-0.27	0.25	0.12	-0.24	-0.26	0.21	-0.18	-0.26	-0.24	-0.21
PEOPLE	-0.27	-0.10	-0.03	-0.32	-0.54	-1.47	-0.40	-0.38	-0.44	-0.28	0.03	0.27	-0.07	-0.26	-0.10	0.20	-0.07	0.09	-0.28	-0.12
If visited, people would make me feel very welcome	-0.29	-0.03	0.06	-0.24	-0.33	-0.97	-0.57	-0.72	-0.67	-0.39	0.05	0.12	-0.11	0.07	-0.42	0.34	-0.22	0.20	-0.09	-0.02
RANK FOR FAVOURABILITY	-0.15	0.11	-0.09	0.31	-0.37	-1.25	-0.19	0.04	-0.06	-0.27	-0.10	0.28	-0.28	-0.01	-0.22	-0.02	-0.17	-0.09	-0.13	-0.24
RANK FOR FAMILIARITY	0.02	0.23	-0.10	0.31	-0.08	-0.40	0.12	0.12	-0.02	0.19	-0.13	0.38	0.13	0.36	-0.05	0.14	-0.02	-0.33	-0.33	-0.14

Source: Anholt-Ipsos Nation Brands Index 2021. Numbers show relative change in UK's score in terms of standard deviations to the mean of all nations, per dimension/attribute, by fieldwork market, from 2020 to 2021. Mean calculated amongst the 50 nations included in both years for fair comparison.

UK changes in relative score for Tourism, Culture and Welcome attributes between 2020 and 2021 – by market

In the rest of this report we concentrate on the UK's rankings. Here we put the ranking changes seen between 2020 and 2021 into more context. We do this though looking at the scores from which the ranks are calculated, comparing the change in the UK's score relative to the average score given to other nations in the survey. This analysis shows that at the global level the UK saw a noticeable decline in relative score across all the main dimensions and attributes we monitor in 2021 except Familiarity and Sports, although there is a lot of market variation.

Standard deviation is a measurement of spread around a mean. We would generally expect that 95% of values in a normal statistical distribution are within the range of ± 2 standard deviations from the average (here, the score for each dimension/attribute, by fieldwork market). It is a useful tool to tell if scores are bunched together, or spread apart – countries giving a wide range of high/low scores would have higher standard deviations. By looking at the change in standard deviations to the mean from 2020 to 2021, we can find useful insights regarding ranking changes: if the UK's ranking changes, but the change in standard deviations to the mean is low, it implies competitors were scored very closely. Hence, even sometimes very small changes in score could lead to changes in rank. The scores analysed are for 50 countries only – countries that were not featured in NBI 2020 were removed. Furthermore, Chinese respondents in 2020 were not given the option of providing a score for themselves, so the 2021 China-on-China scores were also omitted.

Argentina and Mexico show promising results: the UK's standard deviations to the mean in most dimensions/attributes have increased, meaning the UK has received higher scores compared to the average – and this is reflected in ranking changes too.

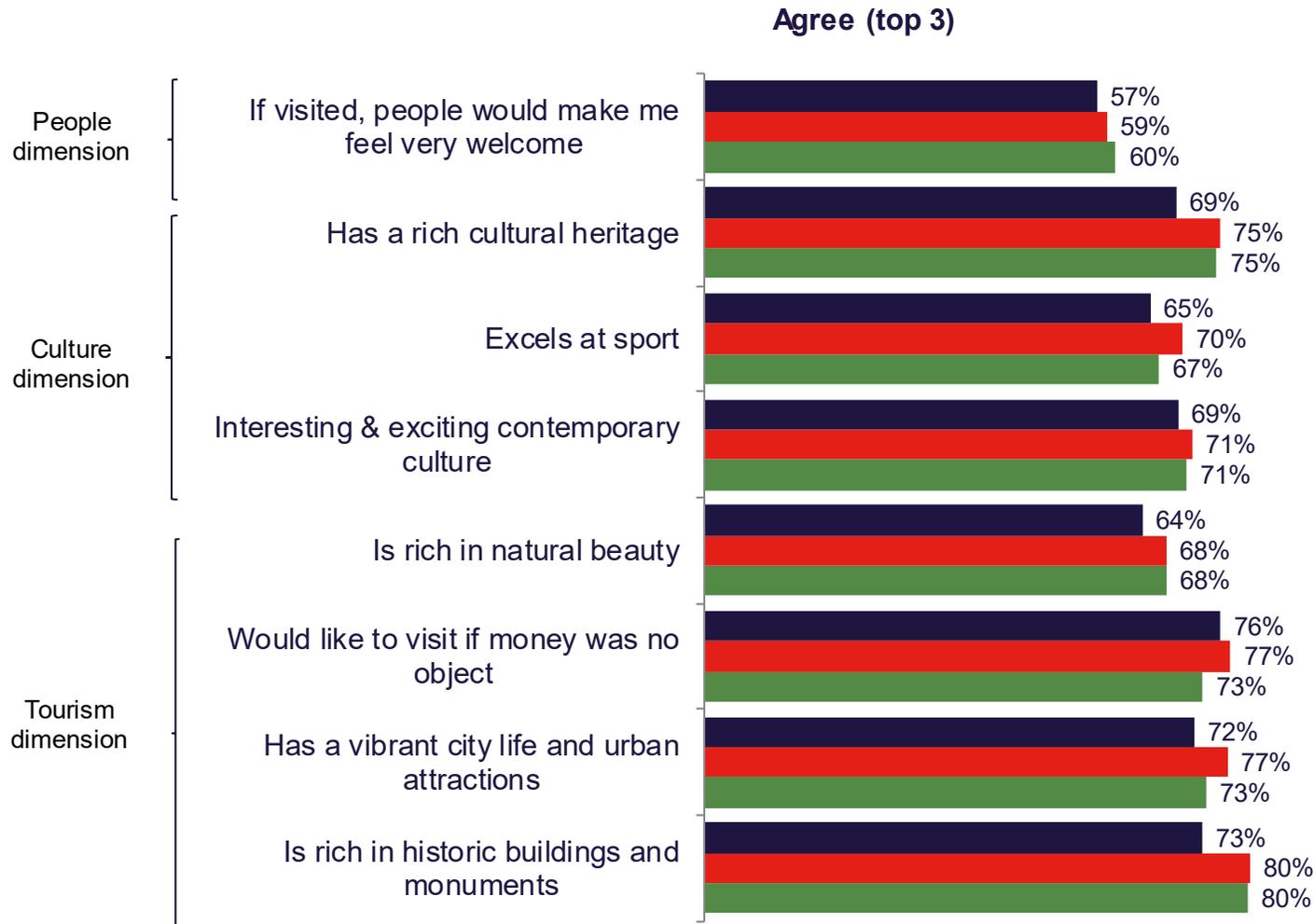
Conversely, scores from **China** tell a different story. With consistently large negative changes, the UK's score in every dimension/attribute has fallen relative to the mean. They are significant enough that we cannot say this was because many competitors scored similarly.

For some countries, such as **Germany**, although we saw changes in rank in certain dimensions/attributes, the change in normalised score in most cases was not especially large, though Welcome was an exception; however, in this market the UK's position has fallen over several years.



Demographic differences

Tourism, Culture and Welcome attributes for the UK – by age



Whilst the majority of each age group tended to agree that the UK possessed the attributes we focus on, there is some variation by age.

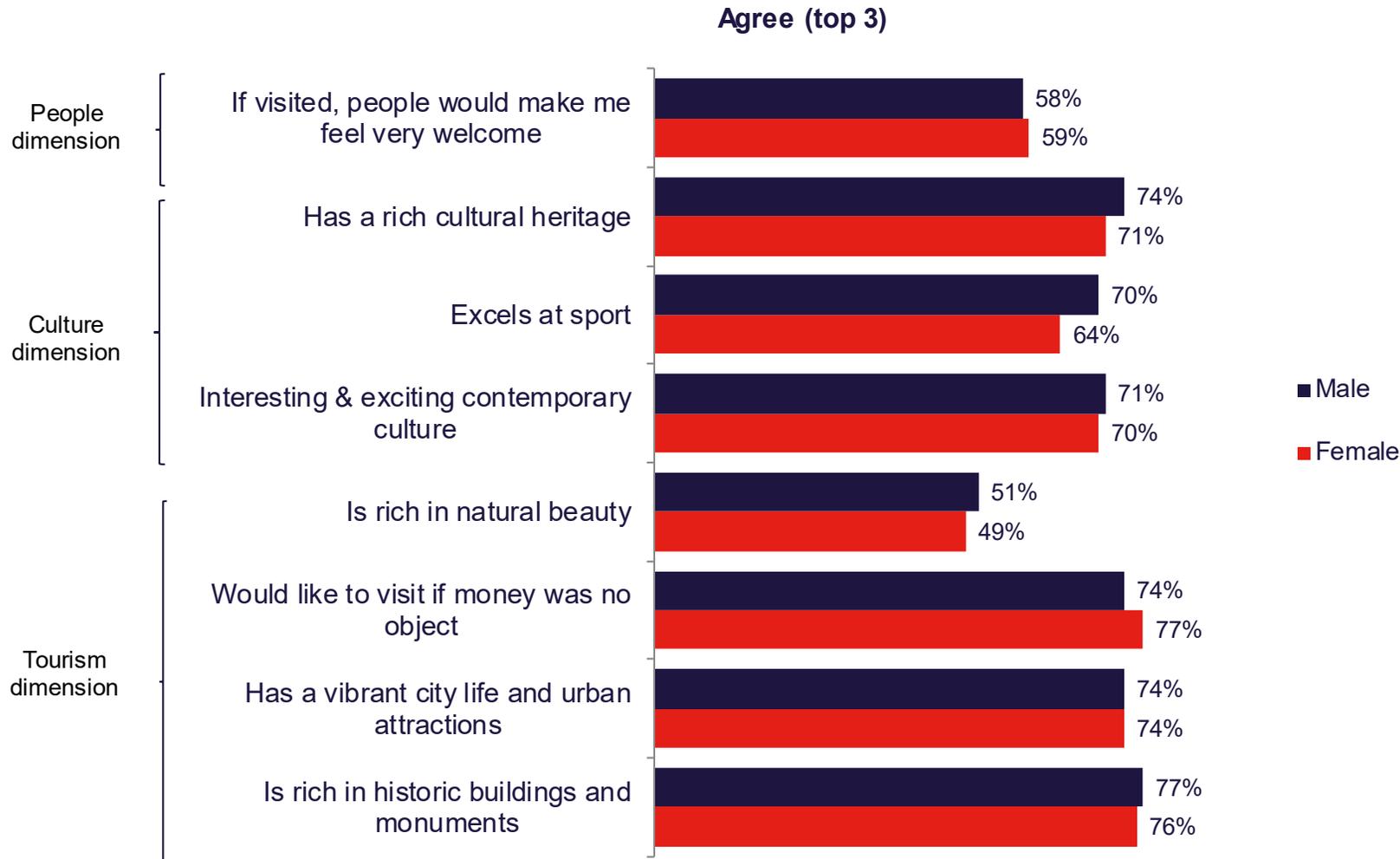
In general, those aged 18-34 were slightly less likely to agree on all attributes apart from wanting to visit if money was no object.

Feeling welcome rises slightly with age whilst those in the middle age category, 35-54 years, were most likely to agree that the UK fulfilled several of the other factors listed.

Source: Anholt-Ipsos Nation Brands Index 2021.

“Please state how far you agree with the following sentence: This country is/has *insert attribute* - United Kingdom”

Tourism, Culture and Welcome attributes for the UK – by gender



By gender, agreement that the UK is welcoming, has interesting/exciting contemporary culture, vibrant city life and rich built heritage was relatively equal between males and females.

Males were slightly more likely to agree that the UK had a richer cultural heritage, excelled at sports and had rich natural beauty, whilst females were more likely to agree that they would want to visit the UK if money were no object.

Source: Anholt-Ipsos Nation Brands Index 2021.

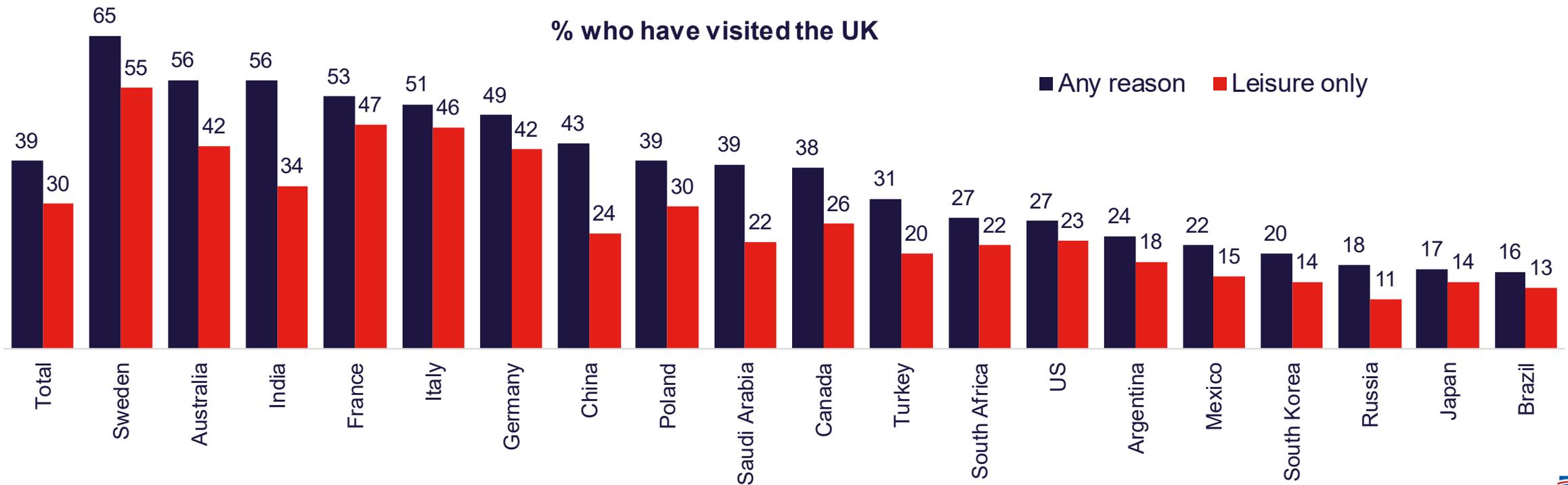
“Please state how far you agree with the following sentence: This country is/has *insert attribute* - United Kingdom”



Previous visitors to the UK

Previous visitors to the UK in 2021

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, China, Saudi Arabia** and **Canada** also have a high proportion of visitors. **India, Saudi Arabia, China, Poland** and **Turkey** 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.



Perceptions of previous UK visitors vs UK total - ranks

Dimension / Attributes ranks 2021	Overall NBI	Overall NBI (previous visitors to the UK)
OVERALL NBI	5	1
TOURISM	6	3
Is rich in historic buildings and monuments	5	5
Has a vibrant city life and urban attractions	6	2
Would like to visit if money was no object	7	4
Is rich in natural beauty	31	25
CULTURE	4	2
Interesting & exciting contemporary culture	4	3
Excels at sport	4	4
Has a rich cultural heritage	8	7
PEOPLE	10	3
If visited, people would make me feel very welcome	18	15

The table to the left shows evidence that those who have previously visited the UK (for either leisure or business) generally have more positive perceptions of the UK. **This audience rank the UK 1st overall.**

Higher ranks are seen across all dimensions with **Tourism** ranking three places higher (3rd), **Culture** ranking two places higher (2nd) and **People** rising from 10th to 3rd place.

Vibrant cities is ranked higher by previous UK visitors whilst the ranking for **built heritage** remains the same as do perceptions of **sport**. The rank for the UK as a place for **contemporary culture** and **rich cultural heritage** are one place higher for previous visitors. Visiting if money was no object is also ranked higher at 4th place. **Natural beauty** and **Welcome** gain some ranks within this audience but are still scored relatively low.

Perceptions of previous UK visitors vs non-visitors - score

Dimension / Attributes ranks 2021	Score change between UK visitors vs UK non-visitors
OVERALL NBI	12.14
TOURISM	8.62
Is rich in historic buildings and monuments	7.16
Has a vibrant city life and urban attractions	8.74
Would like to visit if money was no object	9.23
Is rich in natural beauty	8.17
CULTURE	10.40
Interesting & exciting contemporary culture	0.60
Excels at sport	9.35
Has a rich cultural heritage	7.14
PEOPLE	12.28
If visited, people would make me feel very welcome	12.38

By looking at the score change between non-visitors and previous visitors to the UK, depicted to the left, we can see that **previous visitors scored the UK higher on all dimensions and attributes we focus on showing the positive impact travel can have for perceptions of the UK.**

The **biggest positive difference in perception** is for the **People and Welcome** which is reassuring given that both hit record lows for the UK in 2021. **Culture, Sport and visiting if money were no object** also saw a big jump in scores from previous visitors.

Contemporary culture saw a relatively small increase in score compared to other attributes and it was positive to see the score change for **natural beauty** given in is ranked relatively low overall.

On the next slide, we can look to see how previous visitors to the UK scored the UK in relation to how previous visitors to other nations scored those nations.

Perceptions of previous visitors: UK vs global competitors (1)

Score difference between previous visitors and non-visitors of UK compared to score difference of previous visitors and non-visitors of the other panel markets

	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	Saudi Arabia	South Africa	South Korea	Sweden	Turkey	United States	Total
OVERALL NBI	6.10	-12.00	-2.83	1.33	-1.84	-5.44	-9.24	-17.25	-6.74	-5.55	-4.90	-1.45	-5.90	4.70	-8.57	-5.08	-7.90	-6.51	-5.07	-10.02
TOURISM	8.92	-7.22	1.08	4.72	0.64	-2.07	-5.42	-14.19	-1.46	-2.10	-2.03	0.63	-7.21	9.46	-9.32	-1.38	-0.74	-3.02	-1.82	-5.68
Is rich in historic buildings and monuments	6.71	-5.01	4.21	4.89	0.61	1.47	-5.40	-13.54	-4.35	-2.81	-1.56	0.67	-11.23	9.13	-2.95	-1.74	-0.86	-3.79	0.23	-4.76
Has a vibrant city life and urban attractions	6.70	-8.71	0.61	4.18	-0.14	-1.69	-5.44	-11.36	-1.38	-1.34	-2.60	1.07	-6.11	5.06	-6.09	-3.63	1.48	-2.66	0.82	-4.85
Would like to visit if money was no object	4.24	-11.85	-4.35	-3.50	0.42	-5.68	-7.91	-15.33	-1.64	-3.60	-3.35	-2.16	-5.54	6.21	-13.07	-4.26	-6.36	-4.80	-7.25	-8.87
Is rich in natural beauty	11.00	1.65	2.80	9.32	1.14	-0.94	0.86	-6.06	2.45	0.79	0.77	2.32	-0.72	10.06	-8.16	4.77	3.07	1.23	0.15	-0.24
CULTURE	8.00	-10.53	0.68	4.96	-2.82	-0.81	-8.43	-13.83	-8.13	-4.00	-2.91	-1.10	-9.07	6.50	-5.44	-7.26	-4.53	-7.22	-2.30	-9.35
Interesting & exciting contemporary culture	0.45	-0.87	-0.13	0.27	-0.06	-0.15	-0.56	-1.07	-0.66	-0.37	-0.27	-0.05	-0.37	0.34	-0.39	-0.72	-0.59	-0.64	-0.39	-0.68
Excels at sport	6.30	-14.28	-0.62	-0.43	-3.66	-4.37	-9.00	-12.60	-7.96	-2.64	-4.23	-1.97	-8.19	5.06	-6.17	-5.77	-2.48	-5.26	-4.36	-10.06
Has a rich cultural heritage	6.69	-4.99	4.19	4.87	0.61	1.46	-5.39	-13.50	-4.34	-2.80	-1.55	0.67	-11.19	9.10	-2.94	-1.73	-0.86	-3.78	0.22	-4.75
PEOPLE	10.70	-4.79	-0.45	5.65	-2.59	-5.32	-2.96	-11.73	-2.68	-5.71	-2.77	2.17	-4.35	4.23	-2.68	-0.95	-4.50	-3.00	-1.66	-5.27
If visited, people would make me feel very welcome	7.59	-7.14	-3.39	0.74	-1.49	-8.43	-0.05	-8.06	-6.87	-6.64	-4.77	1.04	-2.95	9.06	-5.50	0.75	-6.62	2.13	-5.80	-4.67

Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations. Normalisation has been applied to the score differences of dimensions and attributes so that they are comparable.

Perceptions of previous visitors: UK vs global competitors (2)

- The previous slide shows the difference in the score uplift for visitors compared to non-visitors for the UK, minus the same score uplift for the all-destination average. A higher number shows that this impact is greater for the UK than it is for other destinations on average.
- The biggest difference in perceptions of the UK relative to those visiting other nations are seen in **Argentina** and **Saudi Arabia** showing that travel to the UK from these markets is having a bigger positive impact on perceptions of the UK. This is especially important for Saudi Arabia whose score for the UK was the second lowest across the panel countries. Previous visitors from **Canada** also scored the UK higher relative to previous visitors of other nations.
- Previous visitors to the UK from the **remaining 16 markets gave the UK a lower uplift** relative to previous visitors of other nations suggesting that visitation to other nations is more strongly associated with more positive perceptions of those nations compared to the UK – perhaps a function of the high levels of familiarity with the UK.



Familiarity and favourability

UK rankings for familiarity and favourability

In total across all markets, the UK's average rank for **Familiarity** gained one spot to 3rd place whilst **Favourability** fell three places to 8th with some dramatic changes at market level.

Familiarity remained stable in Australia, France, Germany, India, South Africa and South Korea. Ranks were gained in Argentina, Brazil, Italy, Mexico, Poland, Sweden and in particular Russia (up 7 places). Declines were seen in Canada, China, Japan and Turkey.

In terms of favourability, small positive changes were seen from Germany, Mexico, South Korea and more noticeably in Brazil (up 7 ranks). No changes were seen in India and South Africa but there were decreases from all other markets with China (-13) and Italy (-10) seeing the largest declines in favourability.

Overall, the favourability of the UK tends to increase with familiarity of the market.

UK's rank from...	Favourability	Familiarity	UK's rank from...	Change in favourability rank from 2020	Change in familiarity rank from 2020
Total	8	3	Total	-3	1
Argentina	9	11	Argentina	-1	2
Australia	5	4	Australia	-1	0
Brazil	5	12	Brazil	7	2
Canada	8	7	Canada	-6	-3
China	17	5	China	-13	-1
France	20	4	France	-6	0
Germany	20	9	Germany	1	0
India	2	5	India	0	0
Italy	16	5	Italy	-10	2
Japan	10	5	Japan	-6	-2
Mexico	6	13	Mexico	3	4
Poland	13	2	Poland	-6	1
Russia	13	3	Russia	-1	7
Saudi Arabia	16	8	Saudi Arabia	N/A	N/A
South Africa	1	3	South Africa	0	0
South Korea	7	5	South Korea	1	0
Sweden	8	3	Sweden	-5	2
Turkey	18	25	Turkey	-5	-12
USA	6	3	USA	-3	0

UK scores for familiarity and favourability – 2021 vs 2020

The data can also be looked at by the proportion of respondents who said they were familiar with the UK and their subsequent opinion of the UK.

We would expect that those who become more familiar with the UK to also become more favourable of the destination; this was the case across many of the panel countries when comparing 2021 to 2020.

However, markets such as **France, Italy, the US and to a lesser extent, Poland and Japan, saw a rise in familiarity but a decrease in favourability.**

China and Canada saw a decline in both metrics, in line with the rank drop shown on the previous slide and their lower overall NBI rank for the UK in 2021.

South Korea saw the opposite effect with lower familiarity but higher favourability in 2021.

	Familiarity (top 3 box percentage point change 2021 vs 2020)	Favourability (top 3 box percentage point change 2021 vs 2020)
Argentina	4%	9%
Australia	1%	0%
Brazil	16%	9%
Canada	-1%	-6%
China	-4%	-4%
France	4%	-1%
Germany	4%	5%
India	13%	14%
Italy	4%	-3%
Japan	7%	0%
Mexico	6%	9%
Poland	6%	-1%
Russia	1%	1%
South Africa	5%	2%
South Korea	-2%	6%
Sweden	4%	2%
Turkey	5%	11%
US	1%	-4%

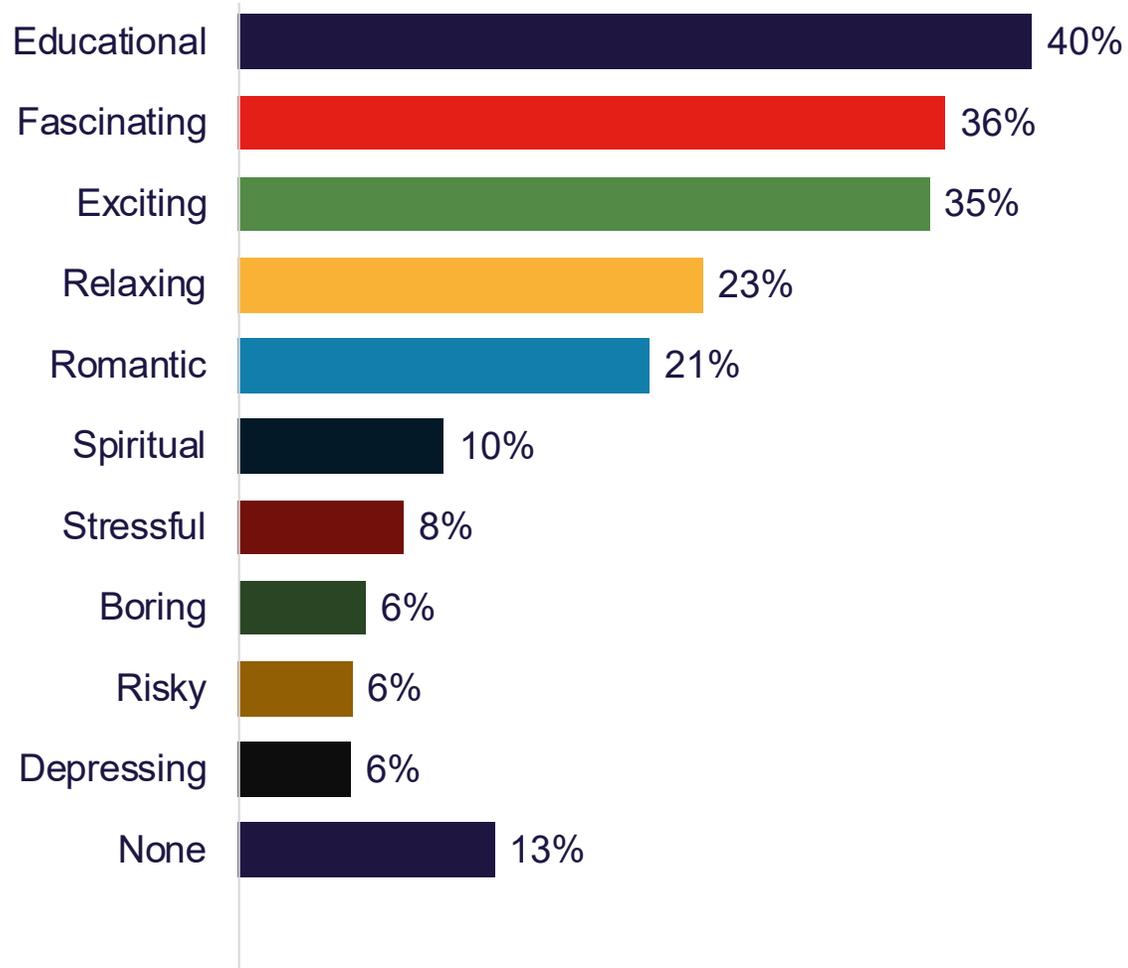
Source: Anholt-Ipsos Nation Brands Index 2021. Ranking is out of 60 nations.

Top 3 box where 1 is very familiar and 5 is never heard of it. Top 3 box where 1 is extremely favourable and 7 is extremely unfavourable.



Tourism and culture associations

Tourism word associations with the UK

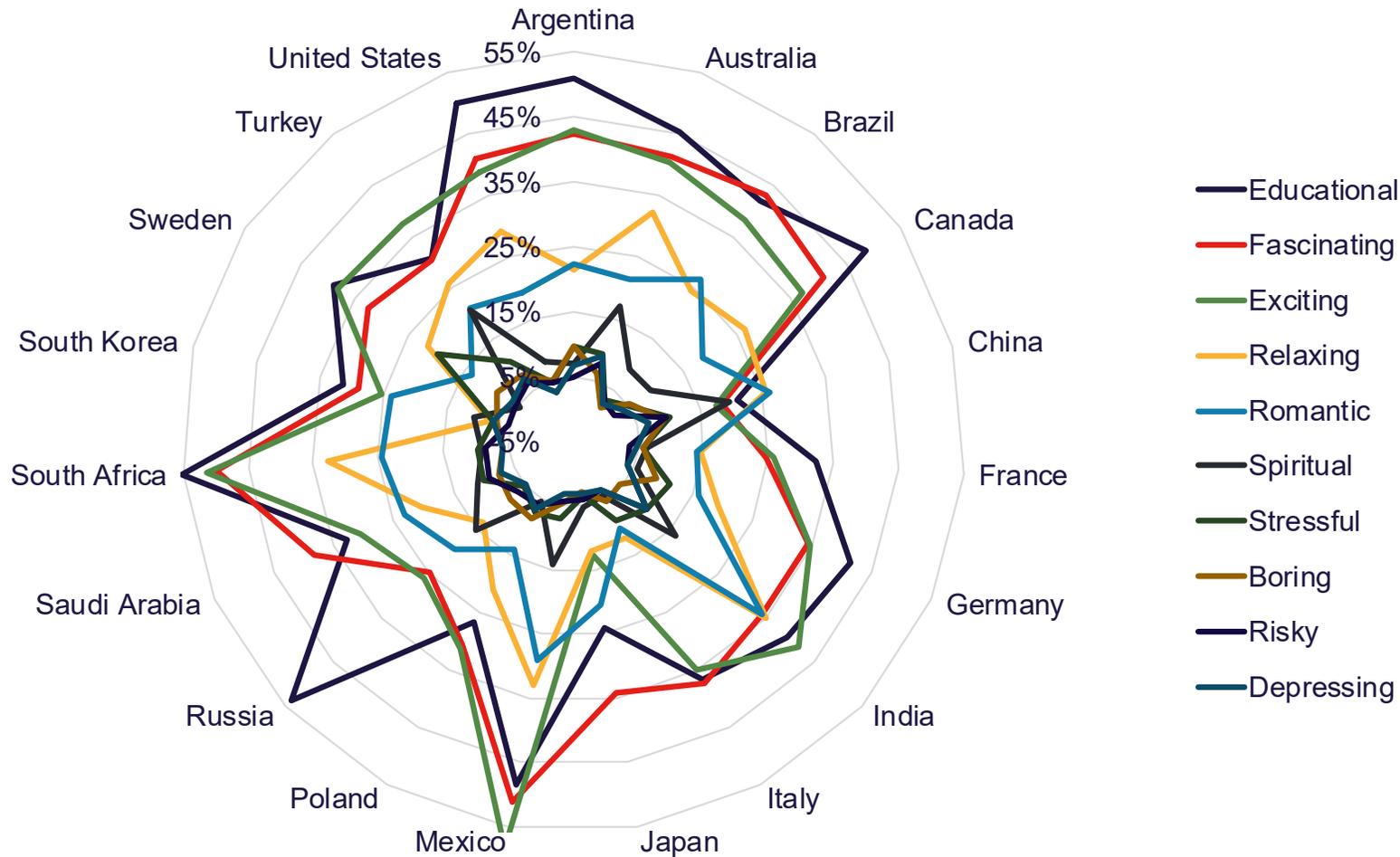


The UK is most likely to be thought of as **‘educational’** (40%) in reflection of the rich history and culture for which the UK is ranked highly. The UK is also highly regarded in terms of offering world class opportunities, and is ranked 2nd for being a good place to study for educational opportunities, which is the highest single attribute rank for the UK and has held 2nd since 2008.

The UK is also seen as **‘fascinating’** and **‘exciting’** by over a third of respondents.

Around 1 in 5 said the UK was **‘relaxing’** and **‘romantic’** whilst the perception of the UK as the remaining descriptors were scored much lower - 10% or below.

UK's tourism word associations by market

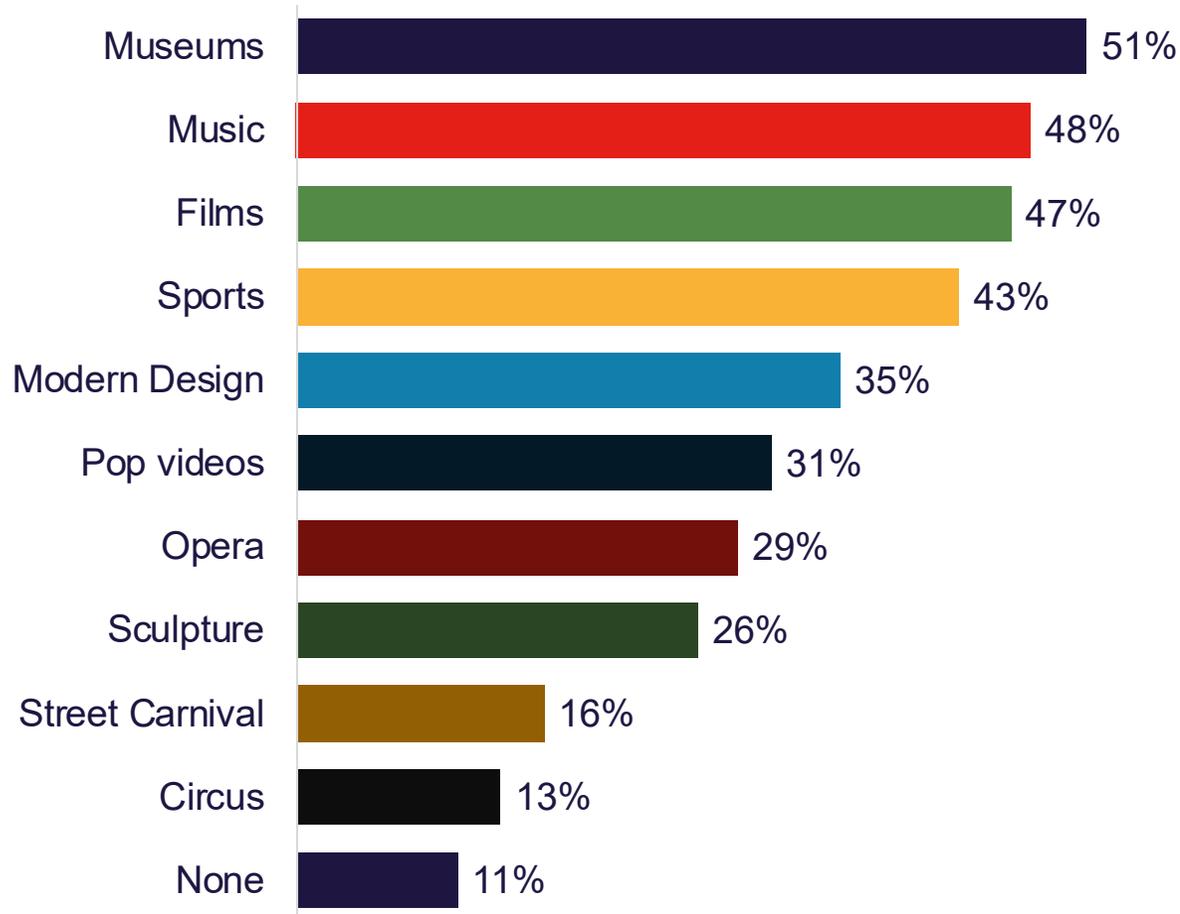


Picking out some markets, the highest proportion of respondents from South Africa, Russia, Argentina and the US said the UK was **'educational'**.

More than half of respondents from Mexico and South Africa said the UK was **'fascinating'** or **'exciting'**.

The UK as **'relaxing'** was expressed by around a third of those from India, Mexico, South Africa and Australia.

Cultural products associated with the UK



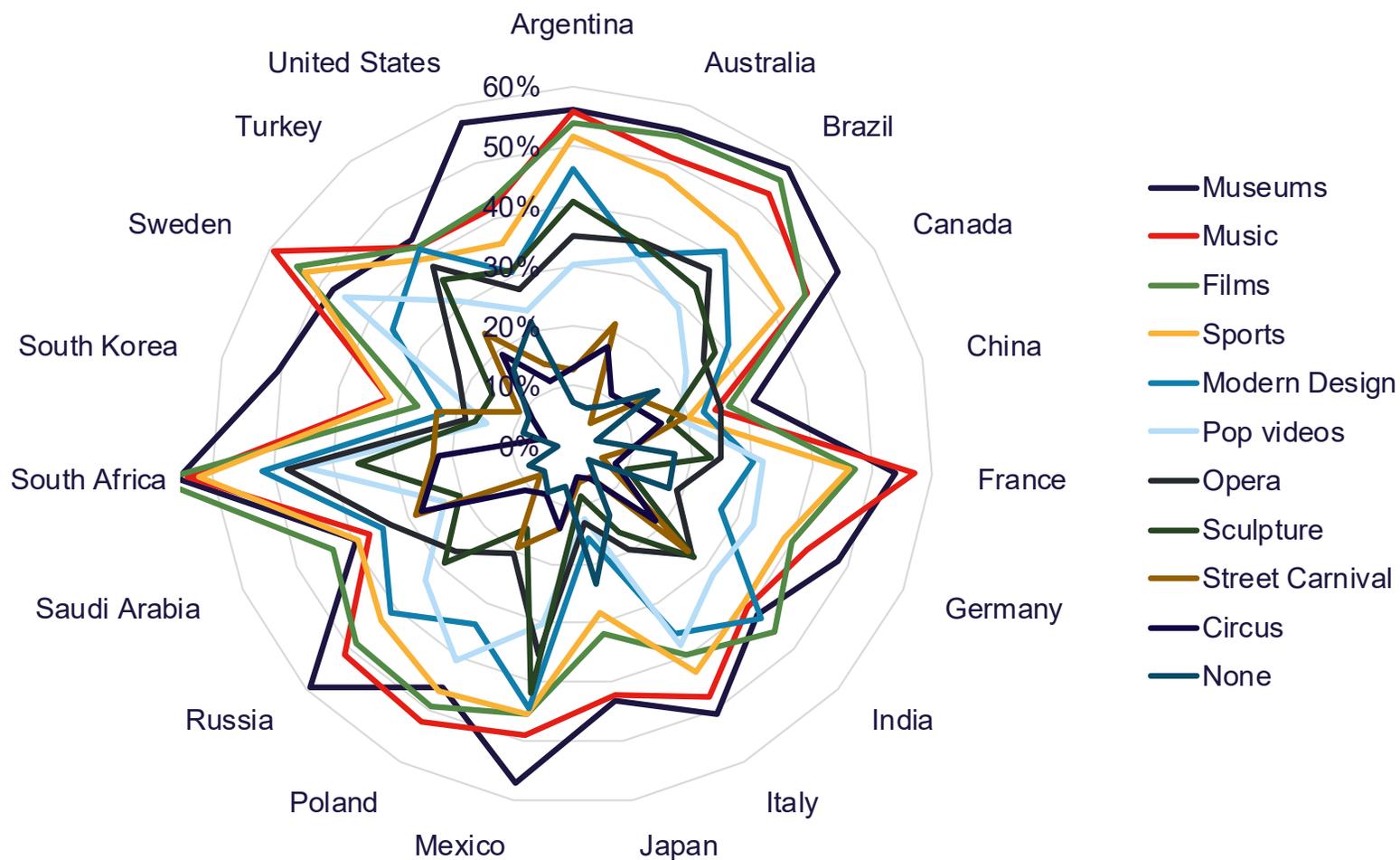
Just over half of respondents associate the UK with **museums**. Nearly half also associated **music** and **films** with the UK with both these cultural products having a strong link to tourism and a key role in driving visitation to certain locations and regions around the UK. All three products have consistently been rated the highest for the UK.

Sports has jumped from 38% to 43% in one year in line with the high ranking of the UK excelling at sport (4th).

Whilst **modern design**, **pop videos**, **opera** and **sculpture** are rated lower, a higher proportion have associated the UK with these products in 2021 vs 2020.

Street carnivals and the **circus** are rated the lowest whilst over 10% of respondents said that they did not associate the UK with any of the above cultural products.

UK's cultural products associated by market



Whilst **museums** were rated the highest overall, respondents from South Africa, India and Saudi Arabia rated the UK the highest for **film** whilst those from Sweden, France, Argentina and Poland mostly associated the UK with **music**.

Sports held the highest association in Sweden (62%) followed by around half in Sweden, Argentina and Australia.

23% in Japan said they did not associate any of the products with the UK followed by just under a fifth in France, Canada and Germany.



Appendix

Tourism word associations with the UK – full table

	Romantic	Depressing	Exciting	Boring	Fascinating	Risky	Educational	Stressful	Spiritual	Relaxing	None
All 20 markets	21%	6%	35%	6%	36%	6%	40%	8%	10%	23%	13%
Argentina	22%	7%	43%	10%	42%	5%	51%	10%	7%	22%	6%
Australia	21%	9%	40%	6%	41%	8%	46%	9%	17%	32%	8%
Brazil	27%	2%	38%	2%	43%	3%	42%	3%	9%	25%	19%
Canada	19%	4%	37%	5%	41%	3%	49%	5%	9%	27%	16%
China	26%	7%	18%	9%	18%	10%	21%	10%	20%	26%	4%
France	14%	5%	26%	6%	25%	4%	32%	6%	6%	15%	22%
Germany	16%	4%	35%	9%	34%	4%	41%	11%	6%	19%	15%
India	34%	10%	42%	5%	34%	10%	40%	10%	16%	35%	3%
Italy	10%	4%	35%	5%	37%	4%	37%	9%	4%	12%	12%
Japan	21%	3%	13%	3%	34%	4%	24%	4%	5%	12%	32%
Mexico	29%	3%	58%	5%	51%	4%	49%	7%	14%	33%	5%
Poland	14%	7%	31%	8%	31%	6%	27%	7%	5%	21%	16%
Russia	20%	5%	26%	8%	25%	7%	54%	5%	15%	14%	12%
Saudi Arabia	23%	7%	31%	8%	38%	9%	33%	10%	11%	20%	10%
South Africa	25%	6%	51%	6%	50%	8%	55%	10%	9%	33%	5%
South Korea	24%	8%	25%	7%	29%	5%	31%	8%	11%	8%	15%
Sweden	14%	6%	38%	9%	33%	5%	39%	20%	5%	22%	11%
Turkey	21%	7%	38%	8%	30%	6%	31%	11%	21%	26%	12%
United States	19%	3%	39%	5%	41%	5%	50%	4%	8%	29%	19%

Cultural products associated with the UK – full table

	Opera	Pop videos	Sculpture	Street Carnival	Sports	Music	Circus	Museums	Films	Modern Design	None
All 20 markets	29%	31%	26%	16%	43%	48%	13%	51%	47%	35%	11%
Argentina	35%	30%	41%	13%	52%	56%	13%	56%	54%	46%	7%
Australia	36%	33%	36%	22%	48%	51%	18%	56%	55%	34%	7%
Brazil	37%	29%	33%	5%	44%	53%	11%	58%	56%	41%	8%
Canada	26%	23%	28%	14%	42%	47%	12%	53%	46%	31%	17%
China	25%	18%	17%	19%	20%	25%	15%	31%	27%	23%	4%
France	25%	32%	23%	9%	46%	57%	10%	54%	47%	30%	17%
Germany	19%	33%	10%	5%	38%	43%	8%	48%	40%	27%	18%
India	27%	32%	27%	26%	39%	40%	19%	42%	46%	43%	4%
Italy	20%	38%	16%	6%	43%	48%	6%	51%	40%	36%	13%
Japan	13%	12%	8%	6%	28%	42%	5%	43%	32%	16%	23%
Mexico	35%	30%	42%	14%	45%	49%	14%	57%	46%	44%	7%
Poland	21%	41%	16%	19%	47%	52%	9%	46%	49%	34%	9%
Russia	26%	33%	29%	7%	43%	51%	11%	59%	49%	41%	6%
Saudi Arabia	33%	23%	21%	28%	39%	37%	27%	39%	43%	34%	8%
South Africa	48%	45%	36%	23%	62%	64%	22%	66%	69%	52%	3%
South Korea	18%	15%	17%	23%	31%	32%	5%	51%	26%	22%	9%
Sweden	23%	45%	16%	11%	53%	59%	8%	47%	55%	36%	9%
Turkey	38%	31%	35%	24%	39%	42%	19%	43%	42%	42%	16%
United States	28%	24%	31%	14%	36%	42%	11%	57%	43%	31%	22%

60 nations ranked in 2021

Argentina	France	Morocco*	Slovakia*
Australia	Germany	Netherlands	South Africa
Austria	Greece	New Zealand	South Korea
Belgium	Hungary	Nigeria	Spain
Botswana	Iceland*	Northern Ireland	Sweden
Brazil	India	Norway	Switzerland
Canada	Indonesia	Palestine*	Taiwan
Chile	Ireland	Panama	Tanzania*
China	Israel*	Peru	Thailand
Colombia	Italy	Poland	Turkey
Czech Republic	Japan	Qatar	Ukraine
Dominican Republic*	Kenya	Russia	United Arab Emirates
Ecuador*	Latvia*	Saudi Arabia	United Kingdom
Egypt	Mexico	Scotland	United States
Finland	Mongolia*	Singapore	Wales

The addition of the new 10 nations in 2021 has made very little difference to the UK's ranks at the global level.

The UK only saw a drop of one rank due to the addition of new nations for:

- Natural beauty (Tourism)
- Welcome (People)
- Protection of the environment (Governance)
- Equality in society (Immigration/Investment)

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VisitBritain Research

December 2021

If you would like the data in a different format, please contact vbresearch@visitbritain.org