

How the Dutch view the UK – 2018

VisitBritain Research
March 2019



Introduction and study details

- The Anholt Nation Brands Index is an annual study amongst 20,000 consumers in 20 panel countries around the world. Respondents score 50 nations (including the UK) on a raft of attributes including some relating to tourism, culture and welcome as well as those relating to exports, governance and immigration / investment. The overall 'nation brand' rank is based on scores across all attributes.
- The Netherlands are not included in the standard set of 20 panel countries and thus VisitBritain has commissioned an additional ad-hoc wave of the 2018 Anholt Nation Brands Index Survey, conducted in November/December 2018. This report is a summary of the key UK findings.
- Please note that ranks and averages for 'all markets' include the standard set of 20 panel countries and exclude the Dutch market.
- The overall nation brand index is made up of six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment). For inbound tourism, the most relevant indices are of course Tourism as well as Culture, plus how 'welcome' respondents feel they would be in the UK (which appears under the People dimension).
- The rank for each dimension of the hexagon is made up of respondents' answers to three to five 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.
- Respondents are representative of the online population in each market, and they are not necessarily international travellers, so for many their views are based on perceptions not experiences.



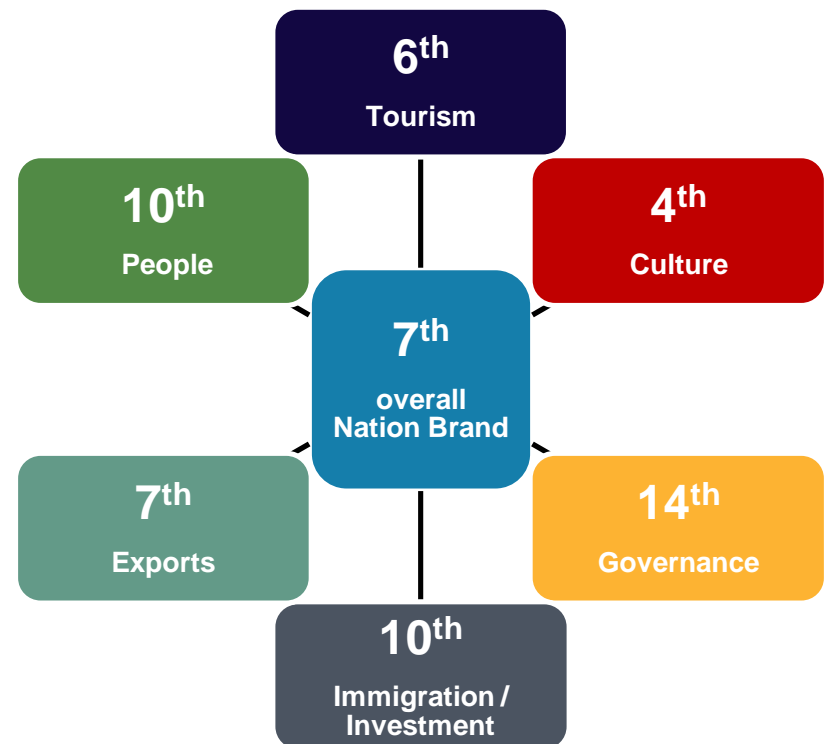
Headline findings

How the Dutch rank the UK in 2018

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.

The UK enjoys a **very good reputation** in the Netherlands for **educational qualifications and contemporary culture** – both ranked 3rd out of 50 countries. It is also held in high regard for **sports, culture** in general and **historic buildings** – all within the Dutch top 5.

Ranking the UK also 7th out of 50 countries on this attribute indicates that there is a **high level of familiarity** with the UK in the Dutch market.





Dutch perceptions of the UK in more detail

UK ranking for NBI dimensions and attributes

UK performance in the Netherlands across these dimensions and attributes:

- **Top ranks:** The Dutch rank the UK within the top 5 out of 50 countries for its **contemporary culture, culture** in general and **sports** as well as **historic buildings and monuments**. Almost all of the other attributes on the left are also ranked within the Dutch top 10.
- The only exceptions to this are the perceptions of **welcome** and **natural beauty** which are areas of weakness for the UK in many inbound source markets.

Hexagon dimension / attributes UK ranks in	All markets	Neth.
	2018	2018
TOURISM	4	6
Rich in historic buildings & monuments	5	5
Vibrant city life & urban attractions	4	7
Would like to visit if money was no object	5	8
Rich in natural beauty	24	26
CULTURE	4	4
Interesting & exciting for contemporary culture	4	3
Excels at sport	5	4
Has a rich cultural heritage	7	6
PEOPLE	6	10
If visited, people would make me feel very welcome	15	15
Would like a person from country as a close friend	4	8
Would employ well-qualified person from country	5	6

UK ranking for NBI dimensions and attributes

UK performance in the Netherlands across these dimensions and attributes:

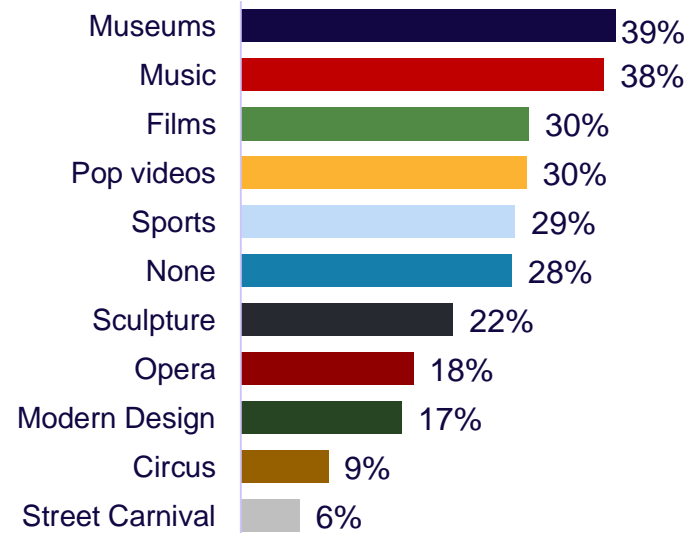
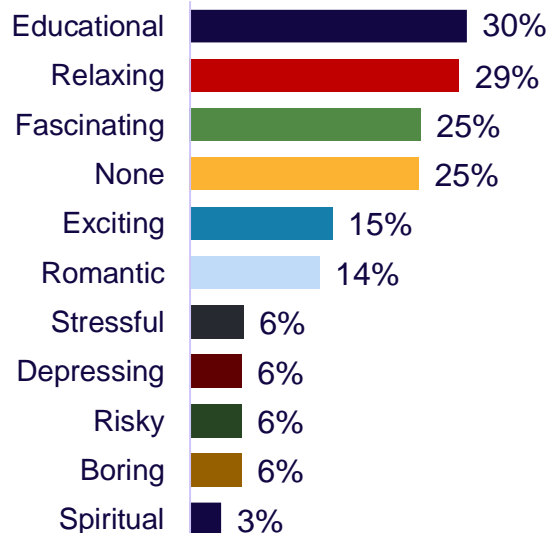
- Top ranks:** The Dutch rank the UK **3rd** as a **good place to study for educational qualifications**. It is also seen as a **major contributor to innovation in science & tech**, regarded highly for its **creative, cutting-edge ideas & new ways of thinking** and is seen as **having businesses respondents would like to invest in** – all ranked within the Dutch **top 10** for the attributes on the left.
- Comparing Dutch ranks with the all market average, perceptions in the Netherlands are either on par or lower, to varying degrees. The biggest difference is noticeable in the ranks for being a place with a high quality of life.

Hexagon dimension / attribute UK ranks in	All markets	Neth.
	2018	2018
EXPORTS	4	7
Major contributor to innovation in science & tech.	5	7
Feel better about buying product if made there	4	11
Creative, cutting-edge ideas & new ways of thinking	4	8
IMMIGRATION-INVESTMENT	4	10
Willing to live & work there for substantial period	4	10
A place with a high quality of life	5	14
A good place to study for educational qualifications	2	3
Has businesses I'd like to invest in	5	9
Cares about equality in society	7	12
GOVERNANCE	10	14
Competently & honestly governed	10	15
Respects the rights of citizens & treats with fairness	7	14
Behaves responsibly in int. peace & security	13	13
Behaves responsibly to protect the environment	12	15
Behaves responsibly to help reduce world poverty	7	15

Cultural products and tourism word associations

The UK is most likely to be thought of as ‘educational’ (30%), and this is likely to be a reflection of the rich history and culture for which the UK is ranked highly. Moreover, the UK is also highly regarded in terms of offering world class study opportunities, and is ranked 3rd for being **a good place to study for educational opportunities**, the highest single attribute rank for the UK.

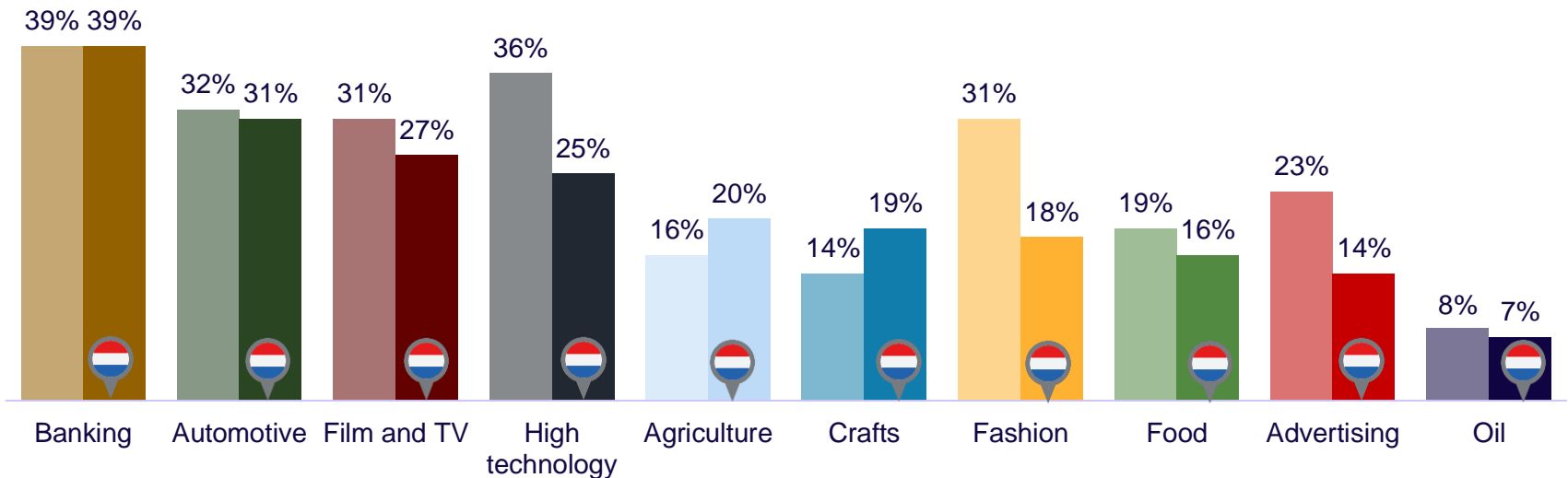
‘**Museums**’ and ‘**music**’ are the most likely cultural product associated with the UK tallying with the above views. The UK is also often associated with ‘**films**’, ‘**pop videos**’ and ‘**sports**’. In addition, 28% said that they did not associate the UK with any of these cultural products or services.



Associations with other export products and services

The UK is most likely associated with **'banking'** and **'automotive'**. About one in four of Dutch respondents stated that the UK is linked to **'fashion'** and **'advertising'**.

Many of the Dutch associations with UK export products and services are on a similar level to the all market average. However, there are wide gaps in associations from all respondents and the Dutch participants of the survey for **'fashion'**, **'high technology'** and **'advertising'**.



The more transparent bars show the all market average for comparison.

Dutch visitation, favourability and familiarity

There is a high level of **familiarity** in the Dutch market with respondents ranking the UK 7th out of 50 countries.

This finding could be partly facilitated by an above average share of those who have already visited the UK. 57% of the Dutch respondents have already been to the UK for any journey purpose, 53% indicated that they had visited the UK for leisure purposes.

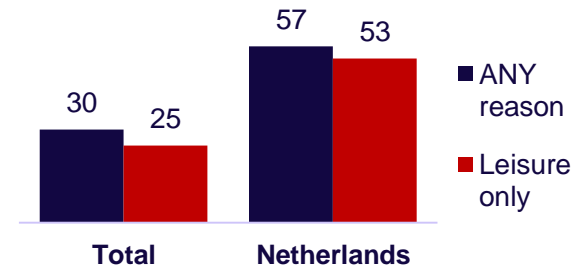
The Netherlands was the **sixth largest source market for volume** of visits to the UK and also the **nineth most valuable source market for visitor spending in 2017**.

48% of the total visitor spend from the Dutch visiting the UK came courtesy of holiday visits in the same year. Dutch holiday visitors set new records for both volume with 860,000 visits and spending of a total of £356m in the UK in 2017 (+18% on 2016).

Dutch participants in the study ranked the UK below average for **favourability**.

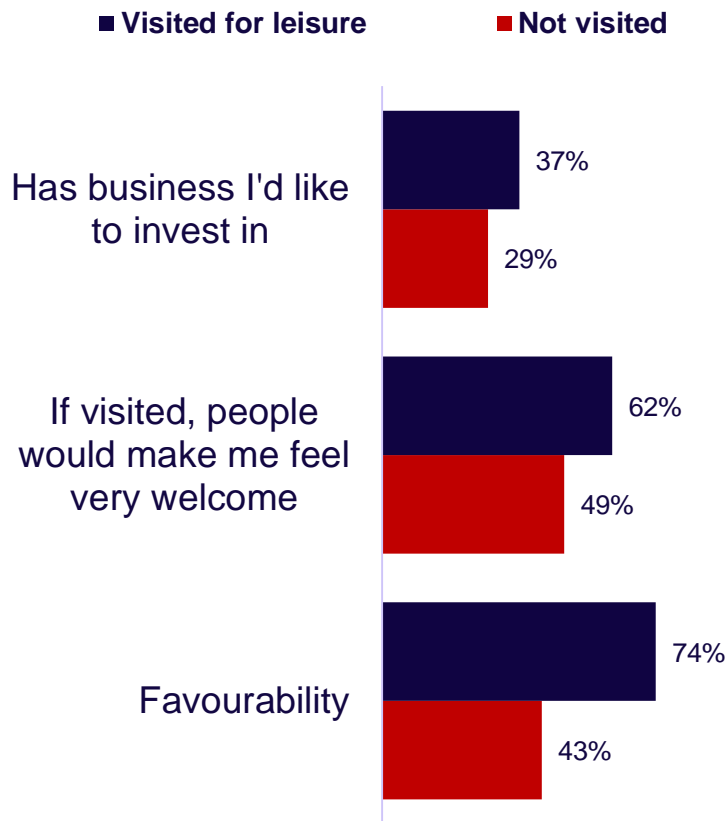
2017	Number of holiday visits to UK (000s)	% of all holiday visits to the UK
Netherlands	860	5.6%

% who have visited the UK



	UK's RANK FOR FAVOURABILITY	UK's RANK FOR FAMILIARITY
Netherlands	16	7
Total	5	3

Previous visitation has a positive influence



When the Dutch respondents had visited for leisure previously, there is a strong tendency for them to hold more positive views of the UK than those who had not visited (cf. a few examples on the left).

Favourability was expressed most strongly by those who had visited for leisure before, with a large gap to those who had not previously been to the UK.

It is noticeable, that almost two in five of the Dutch respondents who had been to the UK for leisure were also saying that they think the UK has **businesses they'd like to invest in**.

Welcome perceptions are also more positive among Dutch previous visitors for leisure than among those who had not been to the UK before.



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