

How the Spanish view the UK – 2018

VisitBritain Research
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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.
- Spain is not included in the standard set of 20 panel countries and thus VisitBritain and the British Embassy Madrid have 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. Comparisons draw on data also collected in an ad-hoc commission of the Spanish market in 2014.
- Please note that ranks and averages for 'all markets' include the standard set of 20 panel countries and exclude the Spanish 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.



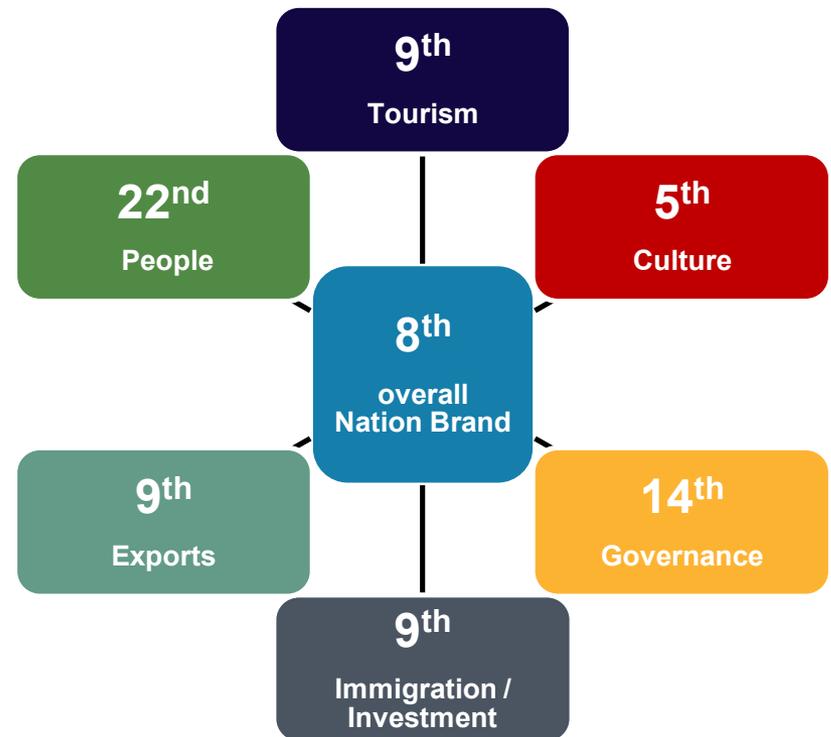
Headline findings

How the Spanish 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 Spain for **educational qualifications, culture** in general and **contemporary culture, vibrant city life** and **urban attractions** and **being a major contributor to innovation in science & tech**.

The Spanish respondents ranked the UK fifth out of 50 countries for their **familiarity** with the country – a **very high level**.





Spanish perceptions of the UK in more detail

UK ranking for NBI dimensions and attributes

UK performance in Spain across these dimensions and attributes:

- **Top ranks:** The Spanish rank the UK 5th out of 50 countries for **vibrant city life & urban attractions, culture** in general and **contemporary culture** as well as **familiarity** followed by 6th for **sports**. The UK's **cultural heritage, tourism** and **historic buildings and monuments** also feature within the Spanish top 10.
- **Areas of weakness** for the UK include low ranks for the **'welcome'** and perceptions of **natural beauty**.
- The Spanish respondents ranked the UK lower than average across the board on all of these attributes, albeit for some only by a small margin.
- Comparing Spanish perceptions 2014 with recent ranks, they were more positive for all of these attributes back then; with the strongest declines noticeable for 'welcome', 'visitation if money was no object' and 'natural beauty'.

Hexagon dimension / attributes UK ranks in	All markets		Spain	
	2018	2014	2018	2014
TOURISM	4	3	9	4
Rich in historic buildings & monuments	5	5	9	8
Vibrant city life & urban attractions	4	4	5	4
Would like to visit if money was no object	5	5	19	4
Rich in natural beauty	24	20	36	22
CULTURE	4	5	5	4
Interesting & exciting for contemporary culture	4	3	5	4
Excels at sport	5	4	6	5
Has a rich cultural heritage	7	7	8	7
PEOPLE	6	4	22	4
If visited, people would make me feel very welcome	15	13	32	11
Would like a person from country as a close friend	4	5	22	4
Would employ well-qualified person from country	5	5	16	2

UK ranking for NBI dimensions and attributes

UK performance in Spain across these dimensions and attributes:

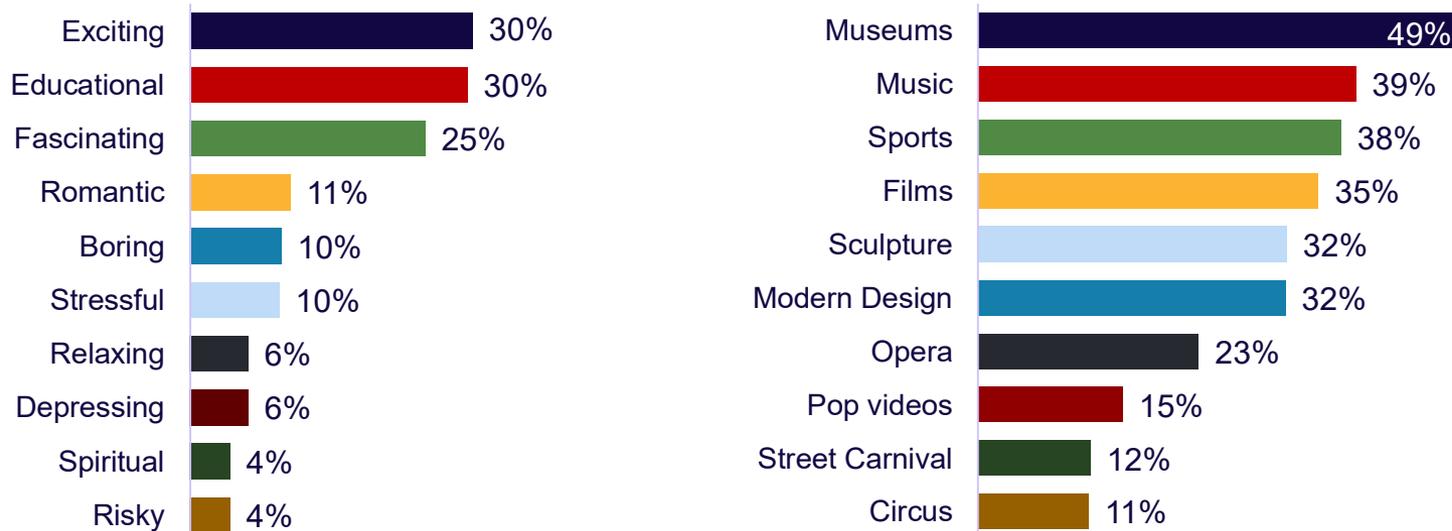
- **Top ranks:** The Spanish rank the UK **3rd** as a **good place to study for educational qualifications** and it is also seen as a **major contributor to innovation in science & tech** which comes **5th** out of 50 countries.
- In all categories of **Exports**, **Immigration** and **Investment** and **Governance**, the Spanish rank the UK below the all market average, but **Exports** and **Immigration** and **Investment** made the Spanish top 10 nonetheless in 2018.
- Comparing Spanish views established in 2014 with those in 2018, it is noticeable that they were more positive across all of these attributes four years ago, albeit to varying degrees.

Hexagon dimension / attribute UK ranks in	All markets		Spain	
	2018	2014	2018	2014
EXPORTS	4	4	9	5
Major contributor to innovation in science & tech.	5	5	5	4
Feel better about buying product if made there	4	4	10	5
Creative, cutting-edge ideas & new ways of thinking	4	4	11	4
IMMIGRATION-INVESTMENT	4	5	9	5
Willing to live & work there for substantial period	4	4	11	6
A place with a high quality of life	5	7	13	9
A good place to study for educational qualifications	2	2	3	2
Has businesses I'd like to invest in	5	6	10	4
Cares about equality in society	7	5	15	9
GOVERNANCE	10	6	14	11
Competently & honestly governed	10	5	17	8
Respects the rights of citizens & treats with fairness	7	5	13	7
Behaves responsibly in int. peace & security	13	9	13	11
Behaves responsibly to protect the environment	12	13	15	14
Behaves responsibly to help reduce world poverty	7	5	15	10

Cultural products and tourism word associations

The UK is most likely to be thought of as **'exciting'** and **'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.

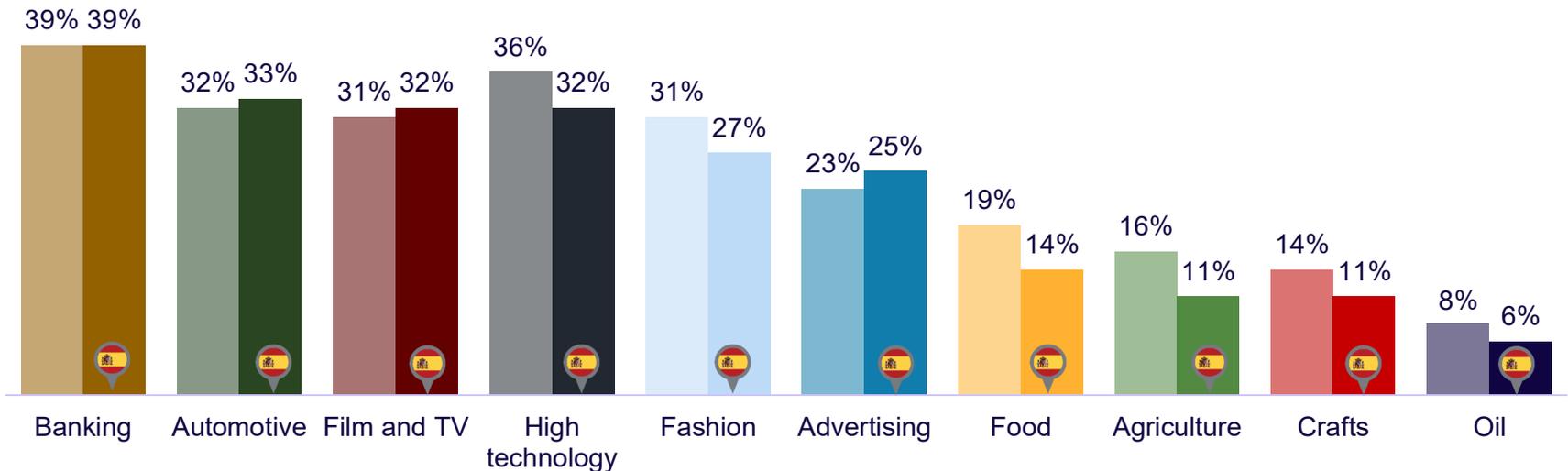
'Museums' are the most likely cultural product associated with the UK tallying with the above views. The UK is also often associated with **'music'**, **'sports'** and **'films'**. Almost a third of Spanish respondents also relate it to **'sculpture'** and **'modern design'**.



Associations with other export products and services

The UK is most likely associated with **'banking'** and **'automotive'** closely followed by **'film and television'** and **'high technology'**. About one in four of Spanish respondents stated that the UK is linked to **'fashion'** and **'advertising'**.

Many of the Spanish associations with UK export products and services are on a similar level to the all market average. The widest gaps in associations from all respondents and the Spanish participants of the survey are for **'food'** and **'agriculture'**.



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

Spanish visitation, favourability and familiarity

There is a high level of **familiarity** in the Spanish market with respondents ranking the UK 5th out of 50 countries.

This finding could be partly facilitated by an above average share of those who have already visited the UK. 44% of the Spanish have already been to the UK for any journey purpose, 41% indicated that they had visited the UK for leisure purposes.

Spain was the fifth largest source market for volume of visits to the UK and also the fifth most valuable source market for visitor spending in 2017.

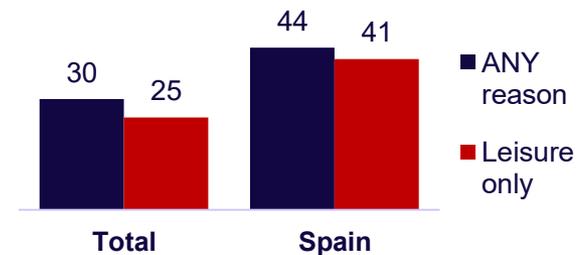
44% of the total visitor spend from the Spanish visiting the UK came courtesy of holiday visits in the same year. Spanish holiday visitor spend set a new record at almost £0.5bn in 2017.

The Spanish market also has a high share of those visiting the UK to see friends and/or relatives who reside there which further supports a high level of familiarity with the destination.

Spanish 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
Spain	1,021 (record)	6.6%

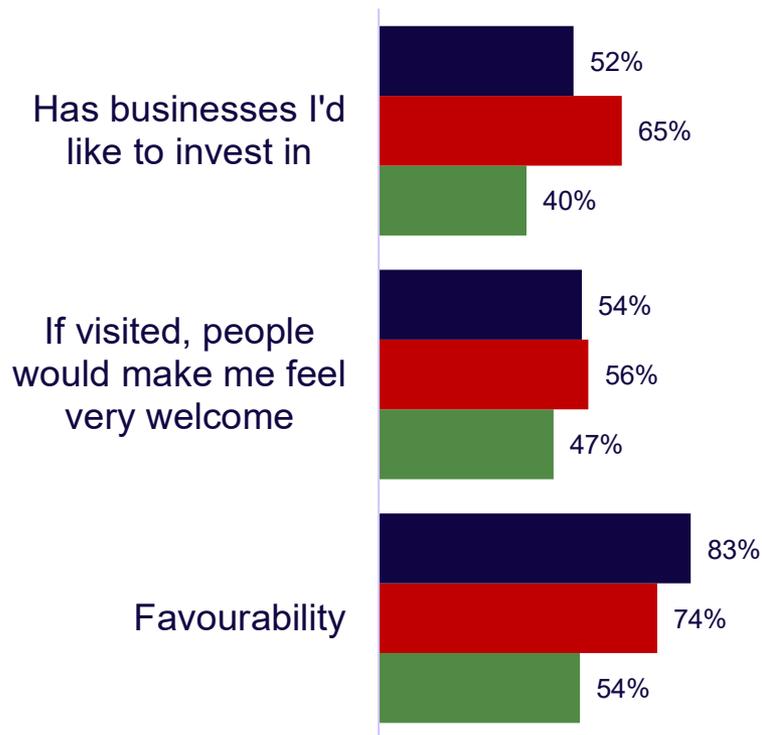
% who have visited the UK



	UK's RANK FOR FAVOURABILITY	UK's RANK FOR FAMILIARITY
Spain	15	5
Total	5	3

Previous visitation, for leisure or business, has a positive influence

■ Visited for leisure ■ Visited for business ■ Not visited



When the Spanish respondents had visited previously, both for leisure and/or business, 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 more than half of the Spanish 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 very similar among Spanish leisure and business visitors and more positive than among those who had not been to the UK before.



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