

How the world views Britain – 2017

Foresight – issue 158

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Introduction

- This edition of Foresight is a summary of the key UK findings from the 2017 GfK Anholt Nation Brands Index survey, conducted in July 2017.
- The GfK 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.
- In this report we first explore the UK brand on each of the NBI attributes and dimensions and changes over time. Keeping in mind the study details we then look at the 2017 familiarity and favourability ranks of the UK. The following section explores each of the tourism related dimensions (Tourism, Culture and Welcome) in more detail and changes to the UK rank on each of these over time. This article then looks at the results by market, highlighting some of the changes we have noticed, before concluding with investigating the UK's tourism and cultural word associations.
- These results paint a detailed picture of how Britain is perceived internationally.

Study details

- The overall nation brand index is made up of six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment). For inbound tourism, the most relevant indices are of course Tourism as well as Culture, plus how ‘welcome’ respondents feel they would be in the UK (which appears under the People dimension).
- The rank for each dimension of the hexagon is made up of respondents’ answers to three to five 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

Headline summary

- The UK's overall NBI rank remains stable in 2017, in 3rd place, with Germany and France ahead in 1st and 2nd.
 - The UK was 3rd for Tourism, two ranks higher than 2016, stable in 5th place for Culture, and one place higher in 6th for People.
 - Governance dropped one place to 11th, whilst Exports held onto 4th place, Immigration & Investment rankings gained one rank to 4th.
 - There were improvements in the UK's score this year across all attributes, compared to 2016.
- Within the Tourism dimension, the UK saw a drop in its ranking for a place to visit if money is no object to 6th with the other attributes within tourism all holding their 2016 place. For People, the UK also saw an improvement this year – up one rank to 6th. The Welcome attribute dropped one place overall, although improved from a number of individual markets after declines in 2016.
- The UK saw a decline in its overall NBI ranking from eight (out of 20 countries) but also saw an improvement in ranking from seven. There were falls in both the overall score and ranks from Brazil, Canada and Germany.
- Overall cultural and tourism associations for the UK remain very stable; “educational”, “fascinating” and “exciting” are still the words most associated with the UK. Our museums have strong associations as do films and music which all have key links to Britain's tourism offer.

Top ten nation brands 2017

The overall top 10 nation brands this year are the same as they have been in the past two years.

While the UK remains in 3rd place, retaining the same spot it has held since 2011, there have been some notable changes in the ranks for some countries.

Germany has returned to take top spot after briefly holding second in 2015 and 2016.

France, too, has seen an improvement, leaping three places into second, the first time it has held second spot since 2009.

The USA has seen significant movement with a fall of five places this year.

With the exception of the USA all top ten nations saw a rise in their overall NBI score in 2017, compared to 2016.

Rank	Nation	Change to 2016
1	Germany	+1
2	France	+3
3	United Kingdom	0
4	Canada	0
4	Japan	+2
6	USA	-5
7	Italy	-1
8	Switzerland	0
9	Australia	0
10	Sweden	0

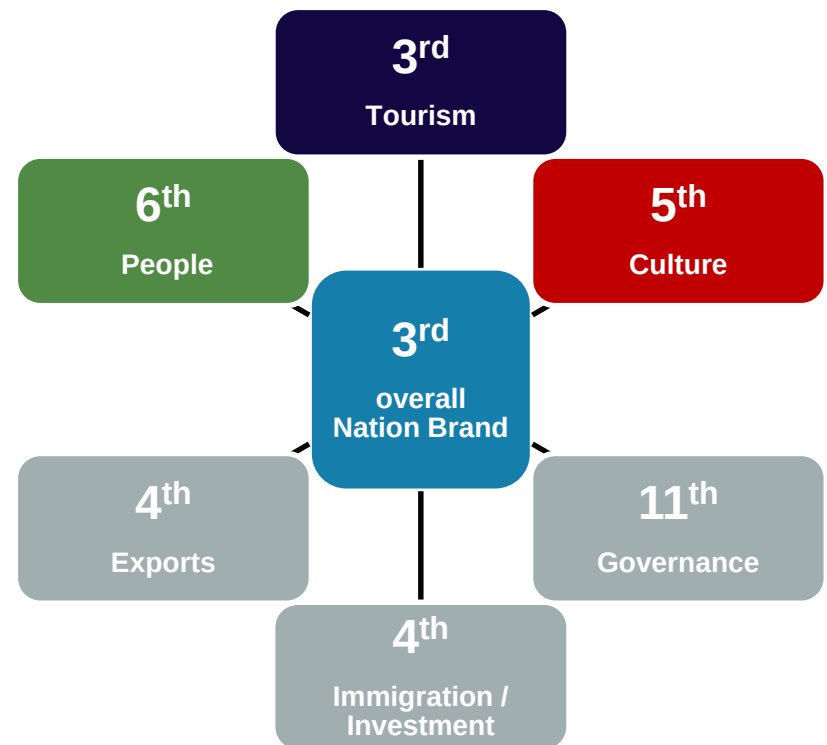
How the UK ranks in 2017

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.

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 in the sporting arena.



UK ranking for NBI dimensions and attributes

Our **Tourism** ranking has regained two places this year, up from 5th to 3rd. The UK has seen a slip of one rank for a place to visit if money was no object, but held rank on all other tourism attributes. 'Natural beauty' remains a relatively weaker area for the UK.

Culture retains 5th place, for the fourth year in a row. There have been improvements in the UK's rank for contemporary culture and sport.

The UK's ranking for **People** is 6th, a one place rise from the historic low of 2016. The 'welcome' attribute has fallen one place this year after a fall in 2016 while having a close friend from the UK has improved one rank.

Hexagon dimension / attribute	UK rank in 2017	Change to 2016
TOURISM	3	+2
Rich in historic buildings & monuments	5	-
Vibrant city life & urban attractions	4	-
Would like to visit if money was no object	6	-1
Rich in natural beauty	24	-
CULTURE	5	-
Interesting & exciting for contemporary culture	3	+1
Excels at sport	4	+1
Has a rich cultural heritage	7	-
PEOPLE	6	+1
If visited, people would make me feel very welcome	13	-1
Would like a person from country as a close friend	4	+1
Would employ well-qualified person from country	5	-

UK ranking for NBI dimensions and attributes

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

Immigration and Investment have improved one rank to 4th, with only the willingness to live and work attribute moving up one rank.

The **Governance** dimension has fallen further this year after a fall of four places last year, now in 11th place. The attribute that has seen the biggest negative shift in ranking is 'respect of citizens' followed by 'competently and honestly governed'.

Hexagon dimension / attribute	UK rank in 2017	Change to 2016
EXPORTS	4	-
Major contributor to innovation in science & tech.	5	-
Feel better about buying product if made there	5	-1
Creative, cutting-edge ideas & new ways of thinking	4	-
IMMIGRATION-INVESTMENT	4	+1
Willing to live & work there for substantial period	4	+1
A place with a high quality of life	7	-
A good place to study for educational qualifications	2	-
Has businesses I'd like to invest in	5	-
Cares about equality in society	8	-
GOVERNANCE	11	-1
Competently & honestly governed	11	-1
Respects the rights of citizens & treats with fairness	8	-2
Behaves responsibly in int. peace & security	9	+2
Behaves responsibly to protect the environment	12	-
Behaves responsibly to help reduce world poverty	5	+1



Tourism, Culture and Welcome rankings

Tourism ranking

The UK's rank for **Tourism** rose two places this year, to a record equalling 3rd place. Across the attributes that make up this tourism dimension, there has been no change 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 has returned to 6th after briefly rising to 5th in 2016, although there was virtually no difference in score.

Natural beauty remains a weaker attribute for the UK. After peaking in 2015 at 18th it is now holding position in the top half of the table at 24th. The actual score difference on this attribute is minor over time, due to a close grouping of scores among countries.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
TOURISM	4	5	5	4	4	4	3	4	5	3
Is rich in historic buildings and monuments	4	4	4	4	5	5	5	5	5	5
Has a vibrant city life and urban attractions	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
Is rich in natural beauty	23	24	22	22	22	20	20	18	24	24

Culture ranking

The UK's overall ranking for the culture dimension remains stable in 5th place, the same ranking since 2014.

Contemporary culture is one of the strongest attributes for the UK. While in 2016, contemporary culture fell out of the top three, it has returned to 3rd this year.

Perceptions that the UK **excels at sport** has also gained a place this year, returning to 4th after holding 5th place temporarily in 2016. There has been a noticeable shift in this attribute since the 2012 Olympic and Paralympic Games.

The UK's **cultural heritage** is ranked in 7th place this year – a ranking that has mostly held steady in the last nine years.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
CULTURE	3	4	6	4	4	4	5	5	5	5
Is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4	4	4	3	3	3	3	4	3
Excels at sport	7	8	8	5	6	5	4	4	5	4
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7	7

People and Welcome ranking

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

After holding 4th place between 2011 and 2014, perceptions of the UK's people has been changeable. The UK's dimensions rank for **People** has seen two consecutive years of falls in 2015 and 2016, but has improved one rank in 2017.

Overall ranking of the UK's welcome attribute most relevant to VisitBritain – **if visited, the people would make me feel very welcome** – has jumped around since the record highs of 2013 where we held 10th place. Since 2015, there has been a steadily decline of one ranking place each year, with the UK holding 13th in 2017.

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
PEOPLE	6	6	6	4	4	4	4	5	7	6
If visited, the people would make me feel very welcome	14	13	13	12	13	10	13	11	12	13

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

	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	3	9	2	8	6	4	5	5	10	4	2	5	5	2	7	1	5	4	15	1	3
TOURISM	3	10	2	12	5	3	8	8	11	2	5	5	10	9	8	3	7	5	20	1	5
Rich in historic buildings & monuments	5	7	5	8	5	5	9	7	6	2	5	6	10	8	6	4	7	6	11	1	6
Vibrant city life & urban attractions	4	7	3	9	5	3	6	5	5	2	3	4	7	5	5	2	4	2	17	1	3
Would like to visit if money was no object	6	16	4	11	6	3	8	13	17	6	5	8	11	14	12	1	8	5	28	1	6
Rich in natural beauty	24	33	15	24	19	12	22	32	26	7	30	27	31	40	39	24	26	27	29	3	21
CULTURE	5	7	2	9	6	3	5	4	4	3	2	4	7	2	5	1	3	3	11	1	5
Interesting & exciting for contemporary culture	3	6	3	8	5	4	4	3	4	3	3	4	8	3	5	1	4	2	9	1	4
Excels at sport	4	7	3	11	7	5	7	5	6	5	4	6	8	3	8	4	3	4	11	2	5
Has a rich cultural heritage	7	12	5	11	9	5	11	8	6	3	6	6	11	9	7	13	6	7	11	1	10
PEOPLE	6	21	4	10	7	3	7	10	18	7	6	6	10	17	13	2	6	6	20	1	4
If visited, people would make me feel very welcome	13	35	4	13	11	6	34	16	22	10	19	20	16	23	34	7	9	9	25	3	5

Market rankings summary

The UK's overall NBI ranking is consistent with last year; however, there has been some fluctuation in a number of European market including:

- **France:** the UK's NBI rank from its biggest inbound market by volume fell five places between 2015 and 2016 but has recovered four of these places to rank 5th this year. Across all attributes the UK has had no change or an improved rank from 2016 – most noticeably a six rank positive shift for people. Compared to 2015, the UK remains below the rank levels this year on a number of tourism attributes including **natural beauty**, **visit if money was no object** and **historic buildings**.
- **Germany:** the UK's NBI ranking fell further this year. In 2016 it dipped one place, but fell a further three places this year into 10th place. There were decreases in both the Tourism and People dimensions. Within Tourism **natural beauty** fell eight ranks out of the top half of the table to 26th and **visit if money was no object** dropped four ranks to 17th.
- **Poland:** have elevated the UK to second overall this year (having previously held second in 2014). There have been improvements in all three dimensions of **Tourism**, **Culture** and most noticeably **People**, which has climbed five ranks this year.

Market rankings summary

There have been some fluctuation in the following markets as well:

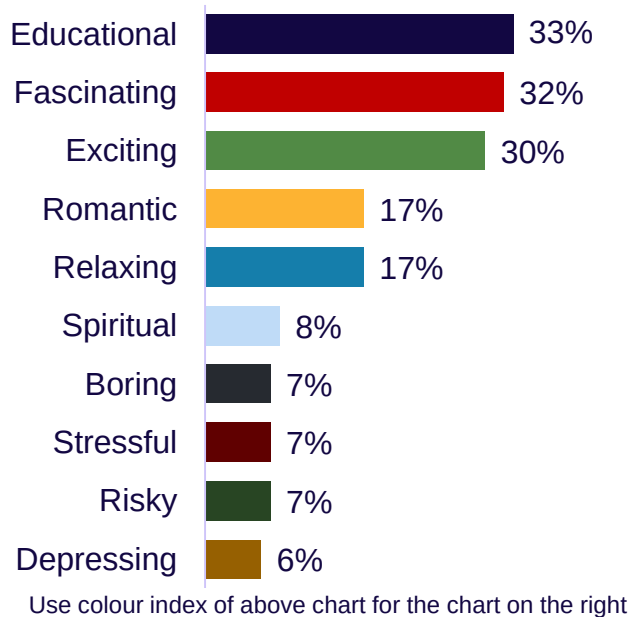
- The **USA** is the UK's biggest inbound market by value and welcomed the UK into the top three again, after a short time in 4th place last year. There were improvements in a number of attribute rankings including **historic buildings** and **vibrant cities**.
- While the UK retains 2nd place rank amongst **Australians** there were decreases in the perception ranks of **historic buildings**, **natural beauty** and **cultural heritage**.
- Overall the UK eased down an additional rank to 4th this year from **China**. However, this hides some big increases; the **People** dimension was up 7 ranks this year. In particular there is a strong recovery for the **welcome** – up 7 ranks to 6th.
- **Argentina** shows an improvement in ranking for the three main tourism related dimensions – **Tourism** (up 7), **Culture** (up 1) **People** (up 5), with **historic buildings** and **natural beauty**, both rising. Perceptions of the UK's **welcome** also improved, but remains an area attracting the lowest perception rank.



Tourism and Culture associations

Tourism word associations

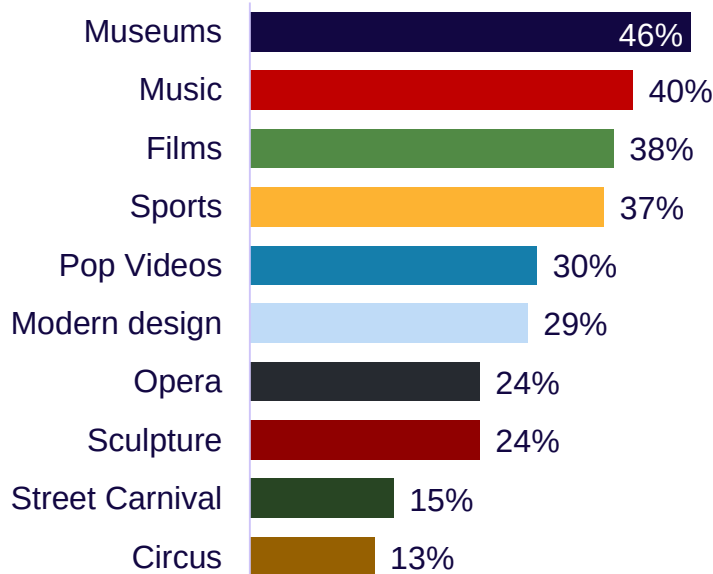
The UK is most likely to be thought of as educational (33%), followed by fascinating and exciting. This is likely to be a reflection of the rich history and culture for which the UK is ranked highly. The UK is also highly regarded in terms of offering world class study opportunities, and is ranked 2nd for being **a good place to study for educational opportunities**, which retains its place as the highest single attribute rank for the UK. The below results are very similar to those seen in 2016. The UK is thought of as educational by many markets, in particular South Africa and Russia. Mexico, Sweden and India are more likely to think the UK is exciting. India, China and Mexico are more likely to associate the UK with being a romantic destination.



Cultural products associated with the UK

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

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



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Familiarity, favourability and
past visitors

UK rankings for familiarity and favourability

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

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

In 2016 **France** ranked us 17th for favourability, but as we saw for the overall NBI rank there has been recovery this year, up four ranks to 13th. There has been improvement in familiarity as well – up from 7th to 5th this year.

The UK has dropped six places for favourability with respondents in **Italy**, who ranked the UK in 8th place. Familiarity has also fallen, but to a lesser extent, down two ranks to 6th.

While both **China** and **Argentina** have seen an erosion of rank places for favourability, the familiarity ranks have increased 4 and 5 ranks respectively.

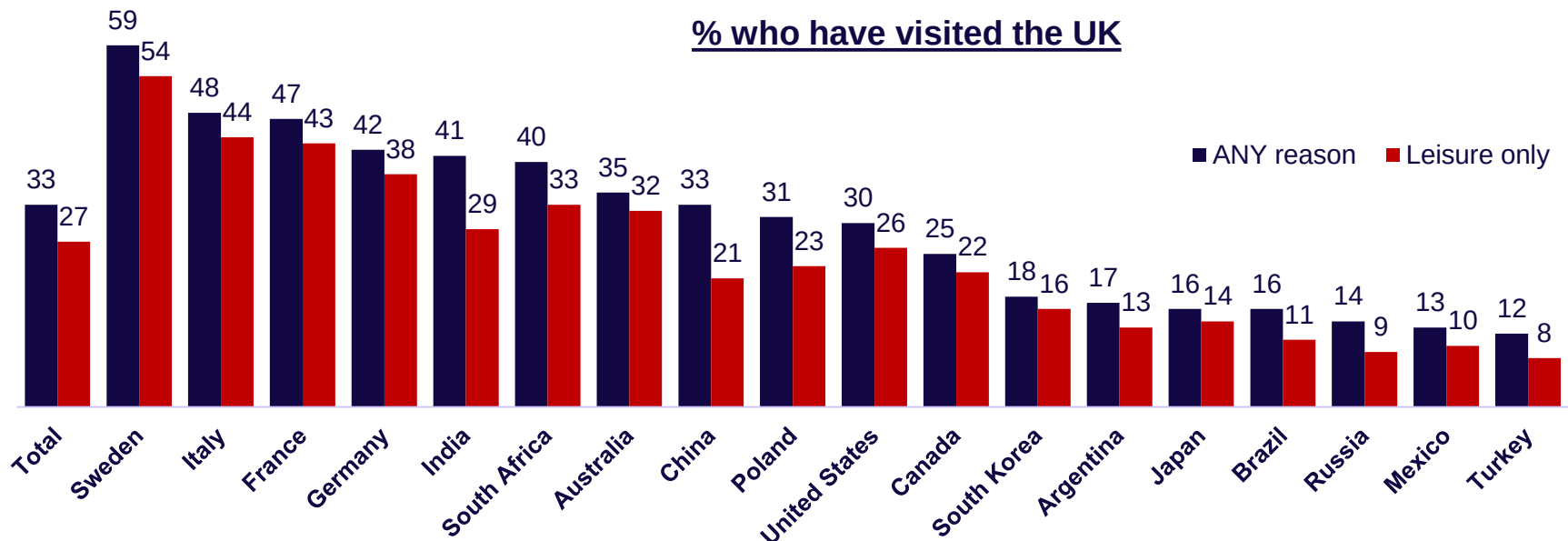
Turkey, who tend to have the most negative perceptions of the UK, have elevated our favourability rank by two ranks and familiarity by three ranks.

Both our favourability and familiarity ranks from the **USA** have improved by one rank this year.

	UK's RANK FOR FAVOURABILITY	UK's RANK FOR FAMILIARITY
South Africa	1	3
India	4	4
Australia	4	2
United States	5	4
Sweden	7	4
Mexico	8	16
Italy	8	6
China	8	3
South Korea	9	5
Japan	9	5
Canada	9	6
Brazil	11	14
Turkey	13	22
Poland	13	4
France	13	5
Russia	14	11
Argentina	14	11
Germany	18	9

Previous visitors to the UK

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



Holiday visits to the UK from NBI markets

- Just over 20,000 respondents were interviewed this year, with around 1,000 from each of 20 countries (including the UK) around the world scoring the UK on each attribute. Interviewing was conducted in July 2017.
- In 2016 there were over 8 million holiday visits made to the UK by residents of the 19 panel countries (therefore excluding the UK) who contribute to the NBI scores and rank. These 8 million visits represented 58% of the all holiday visits to the UK last year, according to the latest available IPS data.
- The NBI remains an important tool for VisitBritain to measure perceptions as the UK's three largest markets (France, Germany and the USA) are covered, as well as sizeable markets like Italy, Australia, Sweden, Canada and Poland. Views were also collected in emerging markets including Brazil, Russia, India, China and South Korea. However, there are absences from our top ten markets including Irish Republic, Netherlands and Belgium whose views may vary from those presented here.

	Number of holiday visits to UK (000s)	% of all holiday visits to the UK
France	1,690	12.2%
USA	1,563	11.2%
Germany	1,530	11.0%
Italy	924	6.6%
Australia	419	3.0%
Sweden	366	2.6%
Canada	334	2.4%
Poland	228	1.6%
South Korea	147	1.1%
India	139	1.0%
China	120	0.9%
Argentina	114	0.8%
Japan	113	0.8%
Brazil	109	0.8%
Mexico	72	0.5%
Turkey	59	0.4%
Russia	47	0.3%
South Africa	39	0.3%
Egypt	12	0.1%
TOTAL	8,023	57.7%



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