

How the world views the UK – 2019

Foresight – issue 173

VisitBritain Research
November 2019



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Introduction

This edition of Foresight is a summary of the key UK findings from the 2019 Anholt-Ipsos Nation Brands Index survey, conducted in July and August 2019. Its results paint a detailed picture of how the UK is perceived internationally.

The Anholt-Ipsos Nation Brands Index (or NBI) is an annual study amongst 20,000 consumers in 20 panel countries around the world. Respondents score 50 nations (including the UK) on a raft of attributes including some relating to tourism, culture and welcome as well as those relating to exports, governance and immigration / investment. The overall 'nation brand' rank is based on scores across all attributes. The 20 panel countries are: Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK, and USA.

VisitBritain commissioned research in two additional markets which are not part of the standard panel (outlined above) in 2018 and 2019: the Netherlands and Spain. Fieldwork in these two markets took place in November/December 2018 and in September/October 2019.

Please note that ranks and averages for 'all markets' include the standard set of 20 panel countries and exclude the Spanish and Dutch markets.

In this report we first explore the UK brand on each of the NBI attributes and dimensions. The following section explores each of the tourism related dimensions (Tourism, Culture and Welcome) in more detail and changes to the UK rank on each of these over time. We then look at the results by market, highlighting the changes between 2018 and 2019 as well as changes in familiarity and favourability for those markets, before investigating the UK's tourism and cultural word associations for all 22 markets.

Study details

The overall Nation Brands Index is made up of six dimensions (Tourism, Culture, People, Exports, Governance, Immigration & Investment). For inbound tourism, the most relevant indices are of course Tourism as well as Culture, plus how ‘welcome’ respondents feel they would be in the UK (which appears under the People dimension).

The rank for each dimension of the hexagon is made up of respondents’ answers to three to five statements – respondents are not directly asked to rank countries overall but they are asked their opinion about a country in relation to each statement, e.g. *‘To what extent do you agree that [the UK] is rich in historic buildings and monuments?’ Please answer on a scale of one to seven where one is strongly disagree and seven is strongly agree*. They give a score for the country on that attribute and then scores are compared to those given to other countries to produce the rankings for each dimension and attribute.

A change in the UK’s ranking might therefore be due to a change in the UK’s score and/or a change in the scores given to other nations in the survey. Ranking changes can be the result of small changes in scores. NB nations often rank themselves top on several dimensions (although Chinese respondents cannot rate China).

Respondents are representative of the online population in each market, and they are not necessarily international travellers, so for many their views are based on perceptions not experiences.

The 50 nations that respondents in the 2019 survey were asked about were: Argentina, Australia, Austria, Belgium, Botswana, Brazil, Canada, Chile, China, Colombia, Czech Republic, Denmark, Ecuador, Egypt, Finland, France, Germany, Greece, Holland, Hungary, India, Indonesia, Ireland, Italy, Japan, Kenya, Mexico, New Zealand, Nigeria, Northern Ireland, Norway, Peru, Poland, Qatar, Russia, Saudi Arabia, Scotland, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, Ukraine, United Arab Emirates, United Kingdom, United States

Context: holiday visits from NBI markets

In 2018 there were over 10.3 million holiday visits made to the UK by people who reside in one of the 21 countries this report focuses on (therefore excluding the UK). These 10.3 million visits represented over two thirds of all holiday visits to the UK in 2018, 68%, 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. In 2018 and 2019, due to the political context, the study was also commissioned in Spain and the Netherlands to improve the coverage of our main markets. Views were also collected in emerging markets including Brazil, Russia, India and China. However, there are still some absences from our top ten markets whose views may vary from those presented here: the Irish Republic and Belgium.

2018 holiday visits to the UK from...	Number in thousands	As percentage of all holiday visits
USA	1,807	11.9%
France	1,644	10.9%
Germany	1,567	10.4%
Spain	1,062	7.0%
Italy	876	5.8%
Netherlands	810	5.4%
Australia	443	2.9%
Sweden	428	2.8%
Canada	339	2.2%
China	224	1.5%
Poland	223	1.5%
India	148	1.0%
Brazil	144	1.0%
South Korea	125	0.8%
Japan	117	0.8%
Mexico	109	0.7%
Argentina	101	0.7%
Russia	61	0.4%
South Africa	54	0.4%
Turkey	38	0.3%
Egypt	11	0.1%
TOTAL	10,330	68.3%



Headline findings

Headline summary

The UK has been overtaken by France and Canada in the overall Nation Brands Index, falling one rank to 4th place in 2019, with Germany holding 1st since 2017. Japan fell three places to 5th.

- In 2019 the UK remained 4th for Tourism.
- However, the UK fell one place from 2018 for both People and Culture, ranking 7th and 5th respectively in 2019.
- The UK lost a place for Governance compared to 2018, falling to 11th in 2019, whilst Exports and Immigration & Investment both held onto their 4th place ranking from 2018.

Looking at **Tourism** attributes, the UK lost one place for ‘would like to visit if money was no object’, and two for ‘natural beauty’, on the 2018 rankings. Perceptions of the UK for its ‘vibrant city life’ and its ‘historic buildings and monuments’ have maintained their 5th and 4th ranks respectively in 2019 though.

While the UK fell one rank in the overall **Culture** dimension, it recovered one rank for the contemporary culture attribute, with the UK back to 3rd place in 2019. Both the cultural heritage and sports attributes maintained their 2018 ranks in 2019 (7th and 5th place respectively).

The UK fell one place from 2018 both for the **People** dimension to 7th in 2019, and for Welcome down to 16th, the fourth successive year-on-year decline for the latter.

The UK saw a decline in its overall NBI ranking from nine (out of 22) countries but also saw an improvement in ranking from five. There are eight countries where the UK retained its 2018 rank.

Overall cultural and tourism associations for the UK remain fairly stable; “educational”, “fascinating” and “exciting” are still the words most associated with the UK, but ‘relaxing’ grew too. Our museums have strong associations as do music and films which all have key links to Britain’s tourism offer; associations of music with the UK in particular rose in 2019.

Top ten nation brands 2019

The overall top ten nation brands this year are the same as they have been in the past four years. However, there have been some notable changes in the ranks for some countries. The UK has been overtaken by Canada, falling down one rank to 4th place. There have been some notable changes in the ranks for some countries. Germany continues to hold top spot in 2018, for the third year in a row (briefly holding second in 2015 and 2016).

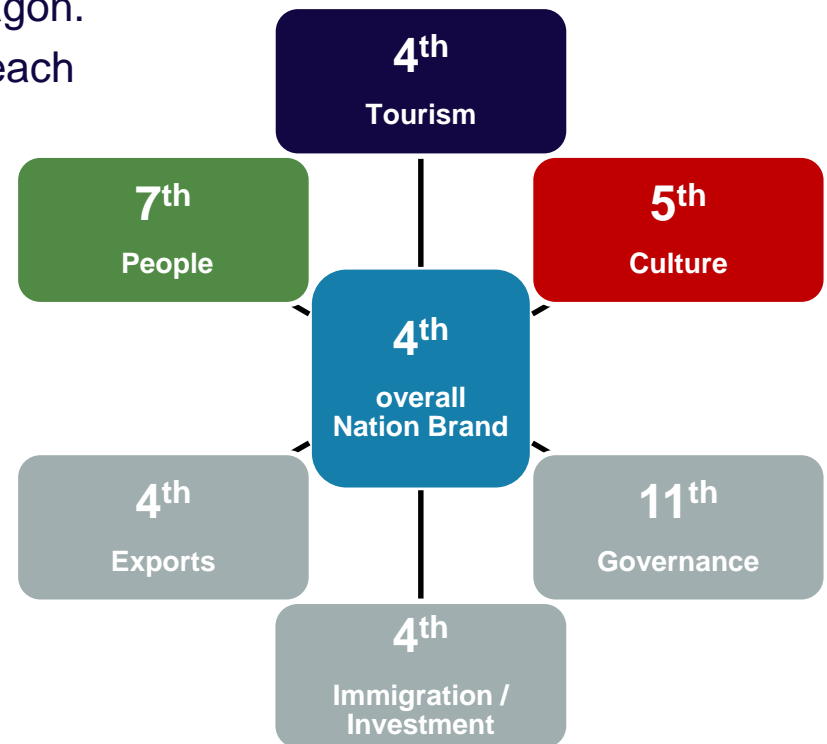
Japan is the obvious mover, dropping three places to 5th. Both France and Canada leapt up two places, now in front of the UK in 2nd and 3rd ranks respectively.

The USA has not seen any recovery from the significant fall of five places in 2017, remaining 6th.

Rank	Nation	Change vs 2018
1	Germany	0
2	France	+2
3	Canada	+2
4	United Kingdom	-1
5	Japan	-3
6	USA	0
7	Italy	-1
8	Switzerland	0
9	Sweden	0
10	Australia	0

How the UK ranks in 2019

The overall Nation Brands Index is composed of six dimensions in the NBI hexagon. Responses to several statements make up each of the six hexagon dimensions, as shown in more detail on the next two slides. Amongst the UK's highest attribute rankings are those for educational qualifications, contemporary culture, vibrant city life and urban attractions and being creative with new ways of thinking – these have been consistently ranked highly. Having a close friend from the UK and willingness to live and work in the UK were held in high regard, as is the UK's reputation around our Exports.



UK ranking for NBI dimensions and attributes - 1

Tourism remained 4th this year. However, within the tourism dimension, the UK has lost one rank for a place to visit if money was no object, returning to the 6th place seen in 2017, and two ranks for ‘natural beauty’, a relative weakness for perceptions of the UK. All other tourism attributes held their 2018 ranks in 2019.

Culture has lost one rank, back to the 5th place it had in 2017, though the UK has improved one rank in perceptions of its contemporary culture.

The UK’s ranking for **People** is 7th, one place down on 2018. The ‘welcome’ attribute has fallen one place this year – the third consecutive year of decline.

Hexagon dimension / attribute	UK rank in 2019	Change to 2018
TOURISM	4	-
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	26	-2
CULTURE	5	-1
Interesting & exciting for contemporary culture	3	+1
Excels at sport	5	-
Has a rich cultural heritage	7	-
PEOPLE	7	-1
If visited, people would make me feel very welcome	16	-1
Would like a person from country as a close friend	4	-
Would employ well-qualified person from country	4	+1

UK ranking for NBI dimensions and attributes - 2

The UK's ranking for **Exports** has retained 4th place, with all attributes in the top five – one falling a rank this year.

Immigration and Investment has retained 4th, with willingness to live and work in the UK and studying for education qualifications in the top three. Apart from those two attributes, all others fell back in the rankings.

The **Governance** dimension has lost one rank, back to the 11th position it held in 2017. There was an increase in perceptions of international peace & security, but all other attributes fell.

Hexagon dimension / attribute	UK rank in 2019	Change to 2018
EXPORTS	4	-
Major contributor to innovation in science & tech.	5	-
Feel better about buying product if made there	4	-
Creative, cutting-edge ideas & new ways of thinking	5	-1
IMMIGRATION-INVESTMENT	4	-
Willing to live & work there for substantial period	3	+1
A place with a high quality of life	6	-1
A good place to study for educational qualifications	2	-
Has businesses I'd like to invest in	6	-1
Cares about equality in society	10	-3
GOVERNANCE	11	-1
Competently & honestly governed	12	-2
Respects the rights of citizens & treats with fairness	10	-3
Behaves responsibly in int. peace & security	12	+1
Behaves responsibly to protect the environment	13	-1
Behaves responsibly to help reduce world poverty	8	-1



Tourism, Culture and Welcome rankings

Tourism ranking

The UK's rank for **Tourism** remained 4th in 2019.

Across the attributes that make up this tourism dimension, there has been no changes in the UK's rank for **historic buildings and monuments** and **vibrant urban life** – both historically strong attributes for the UK. As a destination to **visit if money was no object** the UK has returned to 6th after rising and falling a place each year since 2013.

Natural beauty remains a weaker attribute for the UK. In 2019, it lost two places, now ranking 26th, its lowest rank ever. However, movement for this attribute is usually due to a close grouping of actual scores among countries.

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

Culture ranking

The UK's overall ranking for the culture dimension has decreased down to 5th, the position it kept for four consecutive years before peaking up to 4th in 2018.

Contemporary culture remains one of the stronger attributes for the UK. In 2019, it has gained one place, now ranking 3rd.

Perceptions that the UK **excels at sport** has held its 5th place this year. There has been a noticeable shift in this attribute since the rankings pre-2011.

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

CULTURE dimension and attributes	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Overall	3	4	6	4	4	4	5	5	5	5	4	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	4	3
Excels at sport	7	8	8	5	6	5	4	4	5	4	5	5
Has a rich cultural heritage	6	7	7	7	7	7	7	6	7	7	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** had seen two consecutive years of falls in 2015 and 2016, but improved one rank to 6th in 2017 which it maintained in 2018. However, it has lost back one rank this year, back to the 7th place.

Overall ranking of the UK's welcome attribute is most relevant to VisitBritain – **if visited, the people would make me feel very welcome**. It has jumped around since the record highs of 2013 where the UK held 10th place. Since 2015, there has been a steady decline each year, down to 16th in 2019. However, the UK's actual score has increased (although very slightly); the change in ranking is due to a close grouping of scores among countries.

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

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

Dimension / Attributes in 2019	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Netherlands*	Poland	Russia	South Africa	South Korea	Spain*	Sweden	Turkey	United Kingdom	United States
OVERALL NBI	4	10	3	9	6	3	6	6	12	4	2	5	6	11	2	8	1	5	7	4	14	1	3
TOURISM	4	11	3	11	7	3	11	12	11	2	3	5	9	7	8	11	3	9	7	5	18	1	3
Rich in historic buildings & monuments	5	7	3	10	5	1	12	8	6	2	5	7	9	5	6	10	3	7	6	6	11	1	4
Vibrant city life & urban attractions	4	7	3	7	6	3	7	7	6	1	3	4	9	5	4	8	2	5	5	2	20	1	3
Would like to visit if money was no object	6	17	4	13	9	4	9	13	17	3	5	7	10	13	10	12	5	9	19	8	18	1	5
Rich in natural beauty	26	35	14	28	21	11	32	33	31	7	31	36	19	26	40	38	31	21	33	30	41	2	18
CULTURE	5	9	2	8	7	3	7	3	3	2	2	5	9	3	3	7	3	4	5	2	9	1	2
Interesting & exciting for contemporary culture	3	7	2	8	6	3	6	3	3	3	3	4	6	4	2	5	2	4	5	2	9	1	3
Excels at sport	5	9	3	12	7	4	7	4	5	4	5	7	8	4	5	8	7	4	5	5	13	2	2
Has a rich cultural heritage	7	11	5	12	10	3	12	7	6	3	3	6	12	5	6	9	17	7	8	7	9	1	4
PEOPLE	7	21	3	13	9	5	10	16	18	4	8	7	11	12	10	21	3	5	20	6	25	1	3
If visited, people would make me feel very welcome	16	34	4	16	13	7	32	19	21	15	17	15	17	16	22	38	15	19	26	6	45	3	4

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

Dimension / Attributes changes in 2019 vs 2018	Total	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Netherlands*	Poland	Russia	South Africa	South Korea	Spain*	Sweden	Turkey	UK	United States
OVERALL NBI	-1	0	1	-2	-4	-1	0	-2	-1	1	0	-1	-1	-4	1	0	0	0	1	0	2	0	-1
TOURISM	0	7	-1	1	-4	-1	-1	-6	3	3	2	-1	0	-1	2	-1	0	-5	2	-2	2	0	0
Rich in historic buildings & monuments	0	3	-1	1	-1	2	0	-3	1	1	2	-1	-1	0	1	-4	1	0	3	1	-1	0	-1
Vibrant city life & urban attractions	0	1	-1	0	-3	0	1	-2	0	3	1	0	0	2	2	-1	0	-1	0	-1	-2	0	-1
Would like to visit if money was no object	-1	6	0	-1	-5	-1	0	-4	1	2	5	-2	-3	-5	3	3	-2	-7	0	-5	4	0	0
Rich in natural beauty	-2	2	4	2	0	4	-7	-2	-2	8	2	-15	1	0	3	3	-11	-1	3	-2	2	0	-4
CULTURE	-1	1	0	0	-3	-1	-1	0	0	6	1	0	0	1	-2	0	2	0	0	1	1	0	1
Interesting & exciting for contemporary culture	1	-1	1	-3	-1	0	1	1	1	1	0	1	2	-1	0	1	0	-1	0	0	2	0	0
Excels at sport	0	0	0	0	-2	1	3	1	0	5	1	-1	2	0	1	1	-1	-1	1	-1	3	-1	2
Has a rich cultural heritage	0	4	0	-2	-4	0	0	-1	1	7	4	-1	1	1	2	0	-2	0	0	1	1	0	1
PEOPLE	-1	2	1	-2	-5	-3	0	-2	1	7	-3	-3	-2	-2	1	-2	-2	1	2	0	0	0	0
If visited, people would make me feel very welcome	-1	1	0	0	-5	-2	-4	-3	4	4	-2	0	2	-1	2	3	-4	2	6	2	-5	-1	3
RANK FOR FAVOURABILITY	0	0	0	-3	-4	-1	-6	-1	-1	-3	5	-1	-1	-1	0	3	-1	-2	-4	-1	2	0	1
RANK FOR FAMILIARITY	0	-2	0	-2	-3	2	-	1	1	0	-1	-3	-1	1	0	2	0	-1	0	2	-4	0	1

Market rankings summary (1/4)

The UK's NBI ranking from **Germany** fell further this year – the fourth year of consecutive decreases. The UK now ranks 12th overall, the lowest rank on record from Germany. However, among the dimensions and attributes we usually track, only **natural beauty** saw a year-on-year decrease in 2019, losing a further two places to 31st. Results were on par for **Culture** at 3rd, **sport** at 5th and **vibrant cities** at 6th. And the others improved. Notably, **Tourism** improved three ranks back to 11th, the UK's ranking in 2017, and **welcome** increased four places on 2018 to 21st, just above the 2017 ranking too.

The **Netherlands** ranks sixth by volume and ninth by value among all UK inbound markets (as of 2018). Overall perceptions of the UK by Dutch respondents in the 2019 NBI were more mixed than in 2018, with the UK losing 4 places in the main ranking, down to 11th. Looking at the dimensions we monitor, the UK slipped one place for both **Tourism** and **People**, ranking 7th and 12th respectively in 2019. The UK's **Culture** was best perceived, ranking 3rd and up one place on 2018, ranking 4th for **sport** and **contemporary culture**, and improving one place to 5th for **cultural heritage**.

Sweden still ranks the UK 4th overall in 2019, the same ranking since 2017. Similarly, **People** has been stable since 2017 when the UK slipped to 6th for the Swedes. For **Tourism** overall, the UK slipped back to 5th place with all attributes down in this category except for **historic buildings** where the UK ranks 6th, up one place on 2018. The UK ranked 2nd for **Culture**, also up one place.

Overall perceptions of the UK from **Poland** improved one place to the 2nd best perceived nation brand. Of all the dimensions and attributes we monitor, the UK only lost two places in the **Culture** ranking, back to 3rd after ranking 1st for the first time in 2018. It also came in 2nd in the ranking for **contemporary culture**, equalling its 2018 record ranking for this attribute. It gained two places up to 8th in 2019 for **Tourism** though, and up to 4th for **vibrant cities**, and up 3 places for places to **visit if money were no object**, ranking 10th in 2019.

Market rankings summary (2/4)

France is in the UK's top three inbound markets by both volume and value. After two consecutive years of recovery on the 2016 low, the UK lost two places again in 2019, down to 6th in the overall ranking. Most of the dimensions and attributes we monitor slipped in 2019. **Tourism** was down the most, with 6 places down on 2018, to 12th in 2019, a record low and the first time the UK fell out of this category's top 10 for the French. Their perceptions of the British **Culture** held though, with the UK still ranking 3rd. Looking at it by attributes, **cultural heritage** fell one place to 7th, but both **contemporary culture** and **sport** improved one place to 3rd and 4th respectively, equalling previous records.

Spain was the UK's fifth largest and fourth most valuable inbound tourism market in 2018. Spain's perceptions of the UK seems to have mostly improved in 2019: overall, the UK was ranked 7th, up one place on the 2018 overall ranking. It ranked 7th for **Tourism** too, up two places on 2018. Within this dimension, the UK came 6th for its **historic buildings**, a record ranking, up 3 places. The UK also ranked very well for **Culture**, remaining 5th in 2019 for Spanish respondents. However, despite the UK's rankings improving, perceptions of **welcome** and **natural beauty** from Spain remain weak elements: the UK ranks 26th and 33rd for those in 2019, up 6 and 3 places respectively.

Italy holds very positive views of the UK overall: it remained 2nd in the nation brands ranking in 2019. It also ranked 2nd in **Culture**, up one place, and retaining the 3rd place for **contemporary culture**, while rankings for the other two attributes of this dimension improved. **Tourism** ranking for the UK from Italy also improved 2 places to 3rd in 2019, with all these attributes up on the 2018 rankings. Notably, the UK recovered to the 5th position it held in 2017 as a place Italians would **visit if money were no object**. Even for **natural beauty** the UK recovered 2 places, despite remaining 31st. It lost two places for **welcome** though, down to 17th in 2019.

Market rankings summary (3/4)

The **USA** is the UK's largest inbound market by both volume and value. It ranked the UK 3rd overall in 2019, down one place on 2018. For all three dimensions we monitor though, results were more positive: the UK remained 3rd in **Tourism** and **People**, and improved one place to 2nd in **Culture**. It also gained three places for **welcome**, which slipped to 7th in 2018 (now 4th). The UK reached a new record ranking for **sport**, up 2 places on 2018 to 2nd in 2019, whilst it gained 1 place for **cultural heritage** (now 4th) and remained 3rd for **contemporary culture**.

Despite **Canada** delivering some strong growth in inbound volume and value in the first half of 2019, the UK's rank fell in all the attributes we monitor except for **natural beauty** where the UK remains 21st. Overall, the UK's nation brand fell to 6th in 2019 from 2nd in 2018 (although it was also 6th back in 2017). It is worth noting, too, that the UK also decreased 3 places for familiarity, to 7th.

Results from **Australia** were more mixed this year. After falling two places in 2018, the UK regained one place in 2019 and now ranks 3rd overall for Australians. It also improved one place for **People** to 3rd, whilst it remained 2nd for **Culture**. The UK lost one rank for **Tourism**, though, to 3rd, instead of the record rank of 2nd in 2018; within this the UK lost one place in the rankings for **historic buildings** and **vibrant cities** which had both improved in 2018. The UK still ranks 3rd on both attributes in 2019.

Japan, a more mature Asian inbound market, ranked the UK 5th overall, down one place on the 2018 NBI, but on par with the previous years. The UK was ranked 5th in both **Tourism** and **Culture** – with the former losing one place on the 2018 ranking though. Most attributes saw a decline, except for **Contemporary culture** where the UK was ranked 4th in 2019, up one place on 2018. It also remained 15th for **welcome**. However, **natural beauty**, another area of relative weakness, reached a record low, with the UK losing 15 places, down to 36th.

Market rankings summary (4/4)

Views from **Brazil** were less generous with the UK overall: down 2 places in the overall ranking to 9th in 2019. However, the UK remained 7th and 8th for **vibrant cities** and **Culture**, their highest rank ever. Its position in the rankings for **historic buildings** and **Tourism** was also up 1 place to 11th and 10th in 2019. It lost three ranks for **Contemporary culture** though, but remain in the top 10 for this attribute.

Russian scores would place the UK 8th for the second year in a row in the 2019 NBI ranking. The UK also remained 7th for **Culture**. Despite gaining three places in 2019 vs 2018 for the **welcome, natural beauty** and **'would like to visit if money were not object'** attributes, the UK lost one place for **Tourism**, and two in **People**. Those attributes are usually areas of relative weakness though. Russians ranked the UK 5th for its **contemporary culture**, a stronger attribute, up 1 place on 2018.

Respondents from **China** ranked the UK 3rd overall this year, losing one place on a record equalling 2nd in 2018. However, the UK still ranks high for most attributes: the UK was ranked 1st for its **historic buildings** and 4th for **sport**, both up on 2018 and setting new records, while **vibrant cities, cultural heritage** and **contemporary culture** all held their 3rd ranks and **natural beauty** increased 4 places (to 11th in 2019, still an attribute of relative weakness).

The UK's overall rank from **India** has risen to 4th place in 2019 after reaching a record low of 5th last year. The UK has seen its rank for the key dimensions and attributes increase – ranks for tourism, culture and people matched their records, up to the 2nd place for the former two and the 4th place for the latter. Some attributes improved considerably, including **natural beauty** and **cultural heritage**, up 8 places to 7th and 7 places to 3rd in 2019 respectively, and one reached the first place, setting a new record: **vibrant cities**.



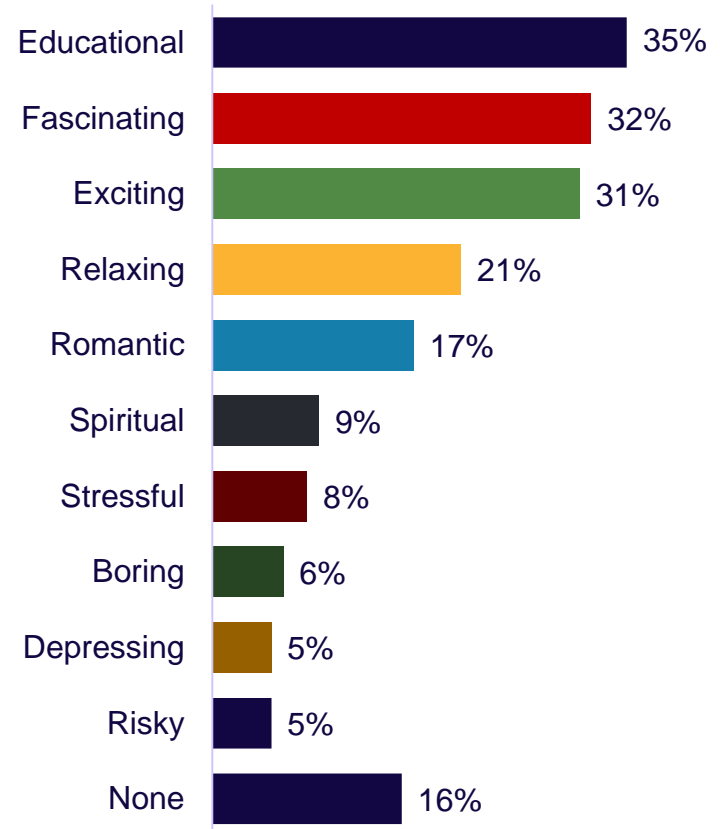
Tourism and Culture associations

Tourism word associations with the UK

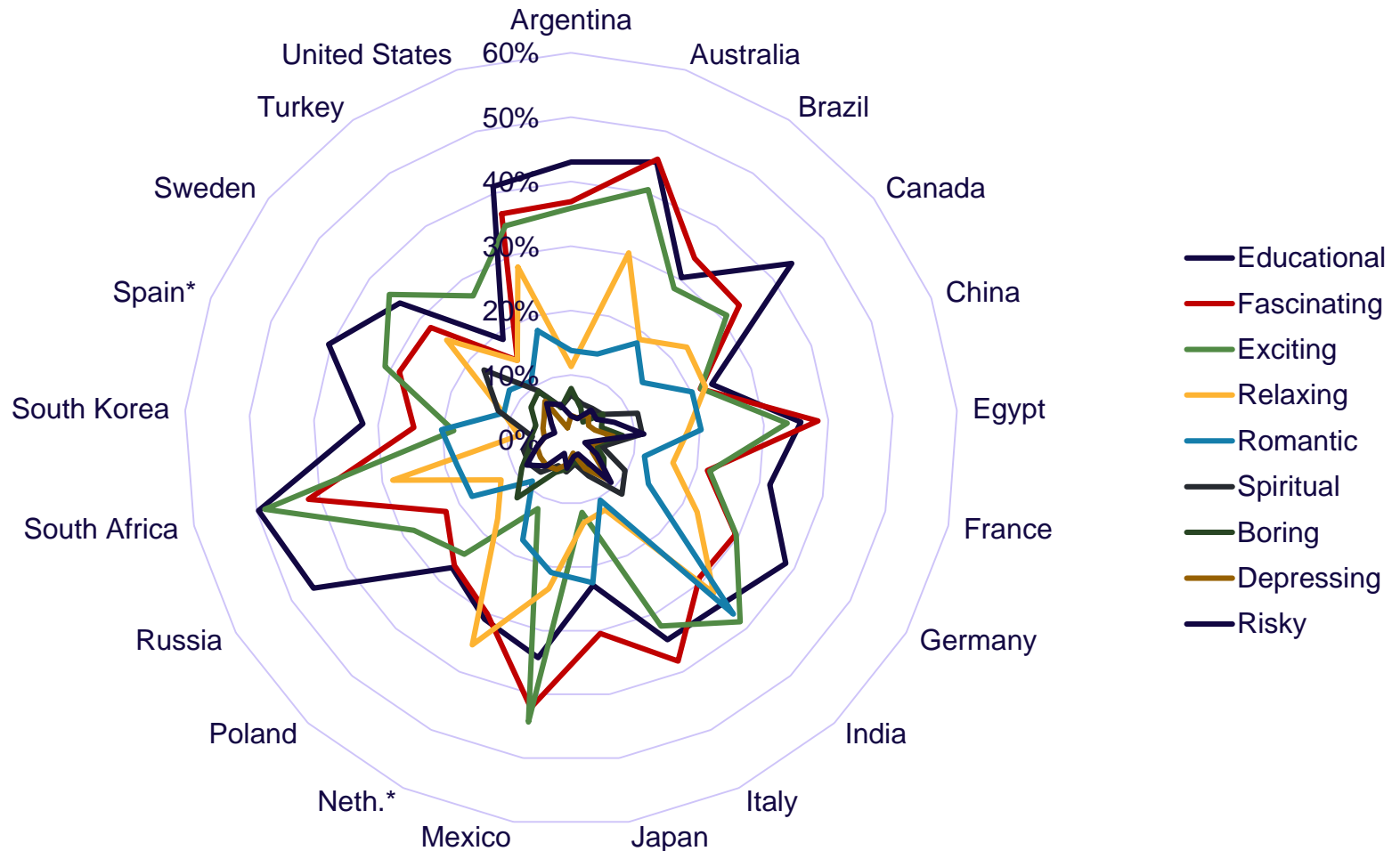
The UK is most likely to be thought of as “educational” (35%) and this is likely to be a reflection of the rich history and culture for which the UK is ranked highly. The UK is also highly regarded in terms of offering world class study opportunities, and is ranked 2nd for being **a good place to study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

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

While most scores are very similar to 2018, “relaxing” has increased from 17%.



UK's tourism word associations by market



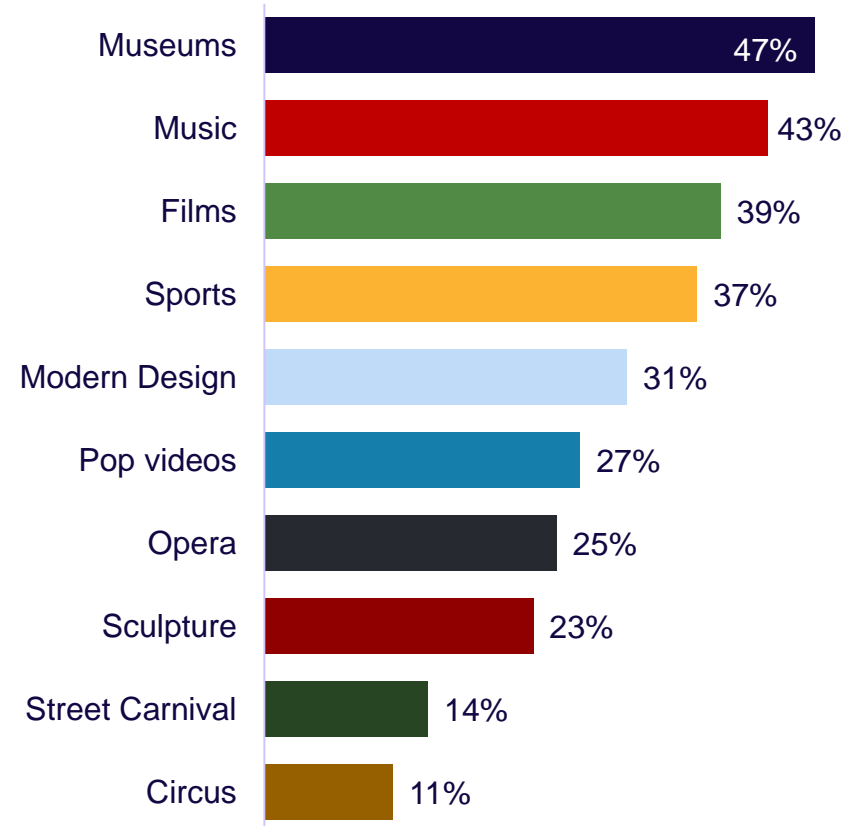
Cultural products associated with the UK

Almost half of respondents associate the UK with museums, very close to the result last year (47%). In particular museums take a clear leading role in Argentina, Australia, Brazil, Canada, China, Italy, Japan, Mexico, Russia, South Korea, Spain and the USA.

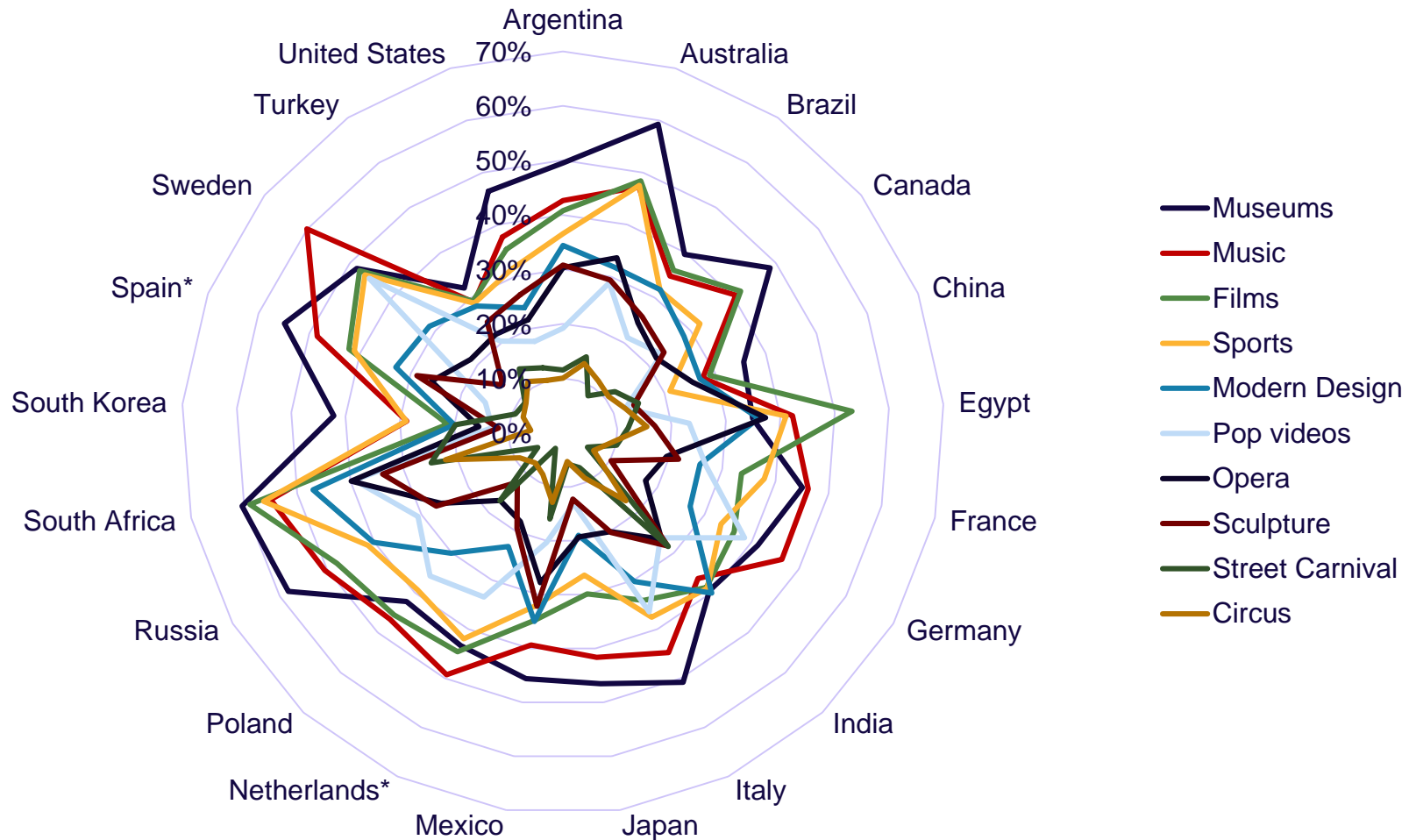
Music follows in terms of cultural associations with the UK, growing by 4 percentage points on 2018. Films come third for association with the UK. Both of those cultural products have a strong link to tourism and are drivers for visiting certain locations and regions around the UK.

The UK's top cultural product in Sweden, Germany and the Netherlands is music while Egypt has the strongest associations of the UK with films.

While most scores are very similar to 2018, "music" has increased from 39%.



UK's cultural products associated by market





Familiarity, favourability and past visitors

UK rankings for familiarity and favourability

Across all markets, the UK's average ranks* for **Familiarity** and **Favourability** are similar to those seen in previous waves, but there have been some changes at the market level.

Main positive changes on 2018 for favourability to the UK were displayed in Italy (up 5 ranks), Russia (up 3). Turkey and the US saw a small improvement too. There was no change in Argentina, Australia, and Poland. The UK's favourability ranking decreased in all other markets, especially Egypt (down 6 ranks), Canada and Spain (both down 4), and Brazil and India (both down 3).

In terms of familiarity, Australia, India, Poland, South Africa and Spain held to their 2018 ranking. However, the UK's rank for this slipped in Argentina, Brazil, Canada, Italy, Japan, Mexico, South Korea and Turkey. It was down 4 ranks in the latter, and lost 3 places in Japan and Canada. Other markets saw moderate growth in ranking.

Russia and the US are the only two markets where both rankings improved, Russia being off a lower base though.

UK's rank from...	Favourability	Familiarity
South Africa	2	3
United States	3	3
Australia	4	4
Italy	5	5
China	6	4
India	6	3
Canada	7	7
Mexico	8	15
Sweden	8	3
Poland	9	3
Japan	10	7
South Korea	10	6
Argentina	12	15
Brazil	12	16
Egypt	15	n/a*
France	16	6
Netherlands*	17	6
Spain*	19	5
Turkey	19	21
Germany	20	9
Russia	22	10
Total	5	3

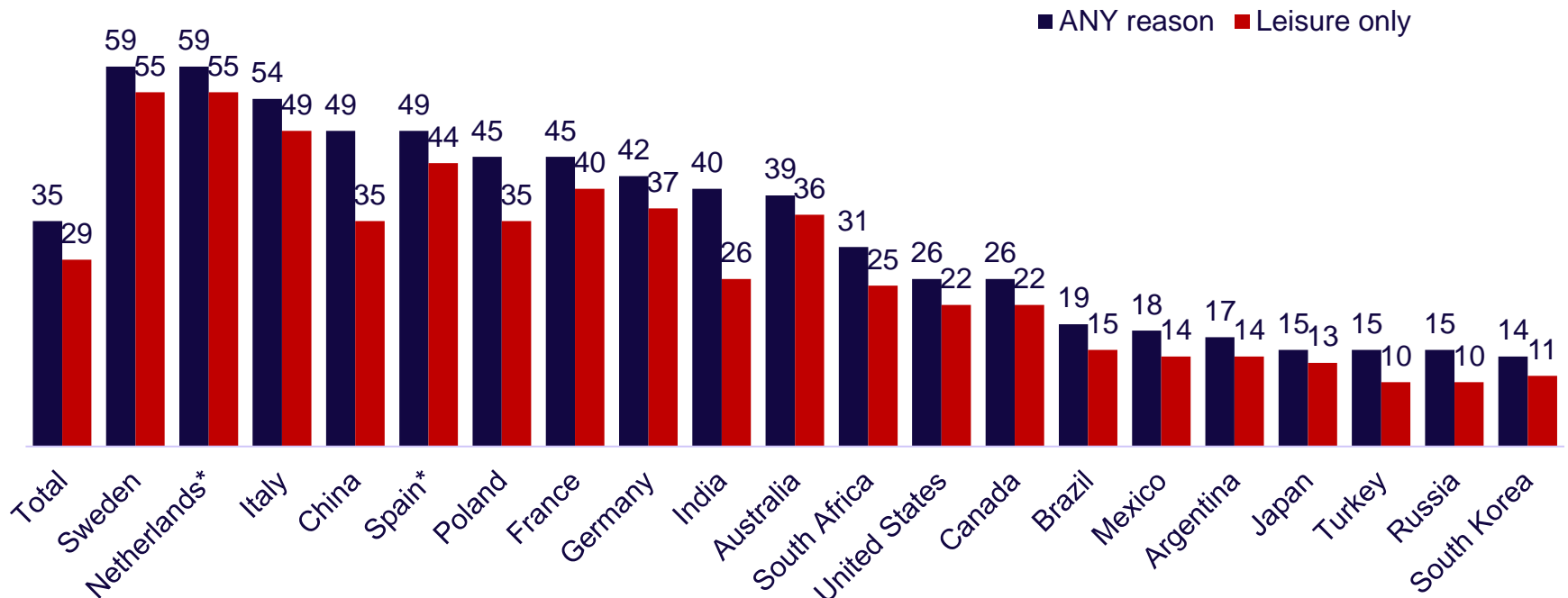
Source: Anholt-Ipsos Nation Brands Index 2019. Ranking is out of 50 nations.

*Ranks for 'Total' include the standard set of 20 panel countries and exclude the Spanish and Dutch markets. **Egypt not asked this question.

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, **China, Australia, India** and **South Africa** also have a high proportion of visitors. **India, China** and **Poland** have a bigger gap between visitors for any reason and leisure visitors, likely to be driven by a larger number of VFR, study or business visits from these markets to the UK.

% who have visited the UK



Source: Anholt-Ipsos Nation Brands Index 2019. NB. Egypt not asked this question.

*Ranks for 'Total' include the standard set of 20 panel countries and exclude the Spanish and Dutch markets.