



Foresight 181
Where the UK sits as a next holiday destination
Nation Brands Index 2021

Background and methodology

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 welcome as well as those relating to exports, governance and immigration / investment. The overall 'nation brand' rank is based on scores across all attributes. However, the survey does also cover topics outside of Nation Brand scoring.

Fieldwork took place from July-August 2021, and was conducted in each market at the same time. The 20 panel countries are: Argentina, Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Turkey, UK & USA. You can read our full report on our website via [Britain's image overseas page](#).

International surveys involve a cultural factor in the way respondents express their opinion. Commonly, Indians and Chinese tend to be very positive in their answers compared to European markets. It is advised to take account of this cultural factors in cross-market analysis, particularly between long-haul and short-haul results.

Each year, VisitBritain sponsors additional questions on the survey. In 2021, VisitBritain asked a question about next holiday destinations whereby each panel country was given a different set of 5 competitor destinations:

- 1. Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).**

You can read past reports on sponsored questions including [attitudes towards international holidays during the pandemic](#) (October 2021), [reasons to return to a holiday destination](#) (August 2020) and [interest in holiday activities in Britain](#) (May 2019). Furthermore, please visit our [Inbound COVID-19 sentiment tracker](#) page on our website for more COVID-19 research and insights.



Summary of findings

Summary

- Findings from this report show where the UK sat as a destination in the mind of respondents from 20 panel countries from the Nations Brand Index. Each panel country was given a different list of 5 competitor destinations to choose from, including the UK.
- At the time of fieldwork, in summer 2021, the world was still in the midst of the pandemic. Even with vaccination rates progressing, the threat of new variants remained and there was still uncertainty about travel. At the time, the majority of travel restrictions were still in place, including for those travelling to the UK. Therefore choice of destination was possibly skewed towards destinations which allowed travellers to travel most freely. However, given relatively low levels of international travel in late 2021 / early 2022, insights on intended next destination are likely to still be instructive for high season 2022.
- Overall, the **average rank for the UK was 3.1 out of 5 across all competitor sets putting the UK in the middle rank as a choice for a next holiday destination**. Markets where the UK ranked above average were primarily long haul markets whilst at the other end, Germany, France and Russia ranked the UK the lowest on average.
 - Within the Americas, **strongest prospects were seen from North America**, in particular the USA where the UK ranked 2nd overall amongst the competitor set. The highest proportion from the US also ranked the UK first at 24%.
 - **In Europe, the UK lagged behind** in France, Germany and Russia. Sweden and Poland were the only markets to see an above average score for both rank and the proportion that ranked the UK 1st.
 - **Low rankings were seen from North East Asia**, specifically Japan and South Korea where the UK ranked last within the competitor set whilst China scored the UK third overall.
 - **APMEA (Asia Pacific, Middle East and Africa) saw some of the highest ranks** from the likes of Australia, India and South Africa whilst Saudi Arabia ranked the UK just above average.
- When looking at the difference in rank between non-visitors and previous visitors to the UK, nearly all markets saw a positive uplift in the average rank for the UK indicating that repeat visitors could be an effective tool to driving recovery in travel to the UK.



Ranking of next possible holiday destinations

Summary of UK ranking

Market	Average rank of the UK	% that chose the UK as the 1 st rank
South Africa	2.6	23%
Australia	2.8	24%
USA	2.9	24%
India	2.9	22%
Canada	2.9	22%
China	3.0	18%
Sweden	3.0	21%
Poland	3.0	21%
Saudi Arabia	3.0	20%
Turkey	3.1	21%
Italy	3.1	17%
Mexico	3.1	17%
Brazil	3.3	20%
Japan	3.3	10%
Argentina	3.4	15%
South Korea	3.4	9%
Russia	3.5	13%
France	3.5	10%
Germany	3.7	10%
AVERAGE	3.1	18%

- The table shows:
 - A summary of the average rank of the UK in each market within a competitive set of 5 destinations, and is therefore on a scale of 1-5 where 1 is highest. Please note that the competitor set for each market varies.
 - The proportion which ranked the UK as the top destination within this competitive set.
- The highest ranks for the UK amongst the competitor sets generally come from long haul markets (though not all); key ones for VB being Australia, the US, India and Canada.
- Key VB European markets such as France and Germany gave the UK the lowest ranking overall.
- The next 5 slides show how the set of 5 destinations were ranked in each panel country.

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).

Americas markets

Market	Rank	Destination	Average rank	% that chose each destination as the 1 st rank
Argentina	1	Spain	2.4	37%
	2	Italy	2.5	26%
	3	France	3.0	12%
	4	UK	3.4	15%
	5	Portugal	3.7	10%
Brazil	1	Italy	2.6	24%
	2	Portugal	3.0	26%
	3	France	3.0	17%
	4	Spain	3.1	14%
	5	UK	3.3	20%
Canada	1	Italy	2.6	28%
	2	France	2.8	23%
	3	UK	2.9	22%
	4	Republic of Ireland	3.2	16%
	5	Germany	3.4	12%
Mexico	1	France	2.6	27%
	2	Italy	2.6	25%
	3	Germany	3.0	18%
	4	UK	3.1	17%
	5	Republic of Ireland	3.7	12%
USA	1	Italy	2.7	27%
	2	UK	2.9	24%
	3	France	3.0	15%
	4	Republic of Ireland	3.1	20%
	5	Germany	3.4	14%

Strongest prospects in North America, particularly the USA.

- Within the competitor sets presented for each market across the Americas, the UK was ranked the highest, at 2nd place, in the **USA**, which also saw the highest proportion of respondents rank the UK in first place (24%).
- The UK shared a similar average rank in **Canada** but was pushed to 3rd placed below Italy and France.
- Whilst in **Brazil**, the UK was ranked 5th out of the competitors but 1 in 5 did rank the UK first.
- The UK saw its lowest proportion of top rankings in **Argentina** and **Mexico**, at 4th place.

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5). N=c3000 respondents per market.

European markets (1)

Market	Rank	Destination	Average rank	% that chose each destination as the 1 st rank
France	1	Italy	2.4	30%
	2	Spain	2.5	31%
	3	Republic of Ireland	3.1	19%
	4	UK	3.5	10%
	5	Germany	3.6	9%
Germany	1	Italy	2.5	28%
	2	Spain	2.7	26%
	3	France	2.9	18%
	4	Republic of Ireland	3.2	18%
	5	UK	3.7	10%
Italy	1	Spain	2.4	34%
	2	France	3.0	18%
	3	Republic of Ireland	3.1	20%
	4	UK	3.1	17%
	5	Germany	3.5	11%
Sweden	1	Spain	2.7	29%
	2	Italy	2.7	21%
	3	UK	3.0	21%
	4	France	3.1	15%
	5	Republic of Ireland	3.4	13%

The UK lags behind as a destination in Europe with strongest prospects from Sweden and Poland.

- Respondents from **France** ranked the UK 4th out of the competitors listed with only 10% ranking the UK first compared to around one third for Italy and Spain.
- In **Germany**, a similar proportion ranked the UK first with the overall ranking for the UK coming in at 5th place.
- **Italy** gave the UK a slightly higher average rank and 17% ranked the UK 1st. However, strong competition with other markets saw the UK ranked 4th within the competitor set.
- **Sweden** gave the UK one of the highest ranks across European markets (3rd) with 1 in 5 also ranking the UK first.

European markets (2)

Market	Rank	Destination	Average rank	% that chose each destination as the 1 st rank
Poland	1	France	2.7	27%
	2	Switzerland	2.9	21%
	3	UK	3.0	21%
	4	Austria	3.1	13%
	5	Germany	3.2	19%
Russia	1	France	2.7	28%
	2	Switzerland	2.8	23%
	3	Germany	2.9	22%
	4	Austria	3.2	14%
	5	UK	3.5	13%
UK	1	Italy	2.7	20%
	2	Spain	2.7	25%
	3	France	3.1	13%
	4	Republic of Ireland	3.2	20%
	5	USA	3.3	22%

The UK lags behind as a destination in Europe with strongest prospects from Sweden and Poland.

- **Poland** saw a similar picture to Sweden, ranking the UK 3rd overall with one fifth of respondents ranking the destination 1st.
- Respondents from **Russia** ranked the UK 5th out of the competitor set, one of the lowest rankings across all markets, with 13% ranking it first.
- **UK** respondents travelling outbound generally favoured short haul destinations to Europe over the US, although the latter did see 22% of first place choices.

North East Asian markets

Market	Rank	Destination	Average rank	% that chose each destination as the 1 st rank
China	1	France	2.8	23%
	2	Switzerland	2.8	23%
	3	UK	3.0	18%
	4	Australia	3.0	20%
	5	USA	3.4	16%
Japan	1	Australia	2.6	28%
	2	USA	2.9	29%
	3	Switzerland	3.0	20%
	4	France	3.2	12%
	5	UK	3.3	10%
South Korea	1	Switzerland	2.5	33%
	2	USA	2.9	29%
	3	Australia	3.1	17%
	4	France	3.2	12%
	5	UK	3.4	9%

Lower rankings from North East Asia with China showing the most interest in the UK.

- Out of the competitor sets shown, the UK ranked the highest in **China** at 3rd, behind France and Switzerland. Just under 1 in 5 placed the UK at 1st rank.
- The UK ranked last in both **Japan** and **South Korea** with all other European destinations and long haul markets in the competitor set sparking more interest in these markets.

Asia Pacific, Middle East and Africa markets

Market	Rank	Destination	Average rank	% that chose each destination as the 1 st rank
Australia	1	Canada	2.8	22%
	2	UK	2.8	24%
	3	Japan	3.1	22%
	4	Italy	3.1	14%
	5	USA	3.2	18%
India	1	Switzerland	2.5	35%
	2	UK	2.9	22%
	3	France	3.0	17%
	4	Germany	3.2	13%
	5	Spain	3.3	13%
Saudi Arabia	1	Switzerland	2.8	25%
	2	Germany	3.0	19%
	3	Spain	3.0	17%
	4	UK	3.0	20%
	5	France	3.1	19%
South Africa	1	UK	2.6	23%
	2	USA	2.7	28%
	3	Australia	2.9	19%
	4	Germany	3.1	15%
	5	China	3.7	16%
Turkey	1	Switzerland	2.8	25%
	2	Germany	3.0	20%
	3	France	3.0	17%
	4	UK	3.1	21%
	5	Austria	3.2	16%

Some of the highest average ranks seen across all markets surveyed.

- **Australia** ranked the UK 2nd overall, the second highest rank for the UK across all markets surveyed. Almost 1 in 4 ranked the UK first.
- The UK ranked second in **India** amongst a list of five European competitors. Again, 1 in 5 ranking the UK 1st.
- The UK came joint 3rd with **Spain** amongst the European competitor set in Saudi Arabia. Switzerland was first whilst France lagged behind as a destination of interest.
- **South African** respondents ranked the UK top out of the competitor set.
- Whilst in **Turkey**, the UK ranked 4th behind key European competitors but above Austria.

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5). N=c3000 respondents per market.

Uplift between non-visitors and previous UK visitors

Market	Uplift in average rank of the UK	Uplift in proportion who chose the UK as the 1 st rank
Argentina	0.6	15%
Australia	0.2	12%
Brazil	0.2	4%
Canada	0.2	8%
China	-0.2	-9%
France	0.1	9%
Germany	0.4	7%
India	-0.1	3%
Italy	-0.1	1%
Japan	0.4	8%
Mexico	0.4	5%
Poland	0.2	6%
Russia	0.2	4%
Saudi Arabia	0.3	4%
South Africa	0.0	4%
South Korea	0.1	3%
Sweden	0.0	2%
Turkey	0.6	18%
USA	0.1	-1%

- Another way we can look at the data is to see the **uplift in average rank of the UK, and proportion who ranked the UK 1st, between previous visitors and non-visitors to the UK.**
- From the table, we can see that previous visitation to the UK is having a positive impact on the average rank for the majority of markets, particularly Argentina, Turkey, Germany and Japan. **A positive uplift suggests that repeat visitation from these markets may act as an effective driver of tourism during recovery efforts in 2022.**
- A slight dip in average rank can be seen from previous visitors from China, India and Italy. China was also the only country to see a dip in the proportion of respondents who ranked the UK first.
- Overall, previous visitors from Turkey, Argentina and Australia saw the highest uplift in those who ranked the UK 1st out of the 5 competitors presented to each market. France, Canada, Japan, Germany and Poland also saw a positive uplift above 5%.
- See appendix for all destination rankings per market.

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).



Appendix

Americas: non-visitors and previous UK visitors

Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
Argentina	1	Spain	2.4	38%	Italy	2.7	24%
	2	Italy	2.6	24%	Spain	2.7	27%
	3	France	3.0	14%	UK	2.8	28%
	4	UK	3.4	13%	France	3.1	16%
	5	Portugal	3.6	11%	Portugal	3.8	5%
Brazil	1	Portugal	2.8	29%	Italy	2.6	25%
	2	France	3.1	15%	UK	3.0	24%
	3	Italy	3.1	18%	France	3.0	16%
	4	UK	3.2	20%	Spain	3.1	18%
	5	Spain	3.3	13%	Portugal	3.3	18%
Canada	1	Italy	2.4	33%	UK	2.7	31%
	2	France	2.8	22%	France	2.7	23%
	3	UK	2.9	23%	Italy	2.9	20%
	4	R.O.I	3.2	15%	R.O.I	3.2	15%
	5	Germany	3.7	7%	Germany	3.5	11%

Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
Mexico	1	Italy	2.6	25%	UK	2.6	26%
	2	France	2.6	27%	France	2.7	23%
	3	Germany	3.0	18%	Italy	2.8	25%
	4	UK	3.0	21%	Germany	3.1	16%
	5	R.O.I	3.8	10%	R.O.I	3.8	11%
USA	1	Italy	2.6	29%	UK	2.7	24%
	2	UK	2.8	25%	Italy	2.8	24%
	3	R.O.I	3.0	20%	France	2.9	17%
	4	France	3.1	11%	R.O.I	3.1	22%
	5	Germany	3.4	15%	Germany	3.3	14%

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).

Europe: non-visitors and previous UK visitors

Market	Rank	Non-visitors to the UK			Previous visitors to the UK			Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st			Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
France	1	Italy	2.4	32%	Italy	2.4	30%	Poland	1	France	2.7	26%	France	2.6	30%
	2	Spain	2.4	33%	Spain	2.6	30%		2	Switzerland	2.9	23%	UK	2.8	24%
	3	R.O.I	3.0	23%	R.O.I	2.9	19%		3	UK	3.0	18%	Switzerland	3.0	22%
	4	UK	3.5	4%	UK	3.4	12%		4	Austria	3.1	13%	Austria	3.1	12%
	5	Germany	3.7	8%	Germany	3.7	9%		5	Germany	3.3	20%	Germany	3.4	13%
Germany	1	Italy	2.5	25%	Italy	2.7	23%	Russia	1	France	2.6	29%	Switzerland	2.8	33%
	2	Spain	2.6	32%	Spain	2.8	25%		2	Germany	2.9	23%	France	2.9	24%
	3	France	3.0	15%	France	3.0	16%		3	Switzerland	2.9	21%	Germany	2.9	14%
	4	R.O.I	3.1	21%	R.O.I	3.1	23%		4	Austria	3.2	13%	UK	3.2	18%
	5	UK	3.8	7%	UK	3.3	14%		5	UK	3.4	14%	Austria	3.2	10%
Italy	1	Spain	2.6	32%	Spain	2.5	33%	Sweden	1	Italy	2.7	16%	Spain	2.7	27%
	2	France	2.9	17%	R.O.I	3.0	20%		2	UK	2.9	24%	Italy	2.8	18%
	3	UK	3.0	17%	France	3.0	17%		3	Spain	2.9	26%	UK	2.9	26%
	4	R.O.I	3.1	17%	UK	3.1	18%		4	France	3.2	18%	France	3.1	13%
	5	Germany	3.6	11%	Germany	3.4	12%		5	R.O.I	3.4	17%	R.O.I	3.4	16%

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).

North East Asia: non-visitors and previous UK visitors

Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
China	1	UK	2.8	27%	France	2.7	25%
	2	Switzerland	2.8	24%	Switzerland	2.9	18%
	3	France	2.9	16%	Australia	2.9	24%
	4	Australia	3.0	17%	UK	3.0	18%
	5	USA	3.5	17%	USA	3.5	15%
Japan	1	Australia	2.6	28%	Australia	2.7	33%
	2	USA	2.9	29%	UK	2.9	19%
	3	Switzerland	3.1	20%	USA	3.0	22%
	4	France	3.2	12%	Switzerland	3.1	19%
	5	UK	3.3	10%	France	3.2	7%
South Korea	1	Switzerland	2.4	35%	Switzerland	2.8	23%
	2	USA	2.9	30%	France	2.9	17%
	3	Australia	3.0	18%	USA	2.9	28%
	4	France	3.3	9%	Australia	3.0	21%
	5	UK	3.4	8%	UK	3.3	11%

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).

APMEA: non-visitors and previous UK visitors

Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
Australia	1	Canada	2.6	21%	UK	2.7	29%
	2	UK	2.9	18%	Canada	2.9	16%
	3	Japan	3.0	26%	Japan	3.1	24%
	4	Italy	3.1	18%	Italy	3.1	15%
	5	USA	3.4	18%	USA	3.2	15%
India	1	Switzerland	2.3	44%	UK	2.8	24%
	2	UK	2.8	21%	Switzerland	2.9	25%
	3	France	3.1	14%	France	3.0	15%
	4	Germany	3.4	10%	Spain	3.0	22%
	5	Spain	3.5	10%	Germany	3.2	14%
Saudi Arabia	1	Germany	2.7	29%	Switzerland	2.5	35%
	2	France	2.8	25%	UK	2.9	21%
	3	Switzerland	2.9	15%	Germany	3.0	15%
	4	UK	3.2	17%	Spain	3.1	16%
	5	Spain	3.4	14%	France	3.4	13%

Market	Rank	Non-visitors to the UK			Previous visitors to the UK		
		Destination	Average rank	Proportion who ranked the destination 1st	Destination	Average rank	Proportion who ranked the destination 1st
South Africa	1	USA	2.6	28%	USA	2.6	28%
	2	UK	2.7	19%	Australia	2.7	22%
	3	Australia	2.9	20%	UK	2.8	23%
	4	Germany	3.2	14%	Germany	3.1	11%
	5	China	3.6	18%	China	3.8	17%
Turkey	1	Switzerland	2.6	29%	UK	2.6	35%
	2	France	3.0	19%	Switzerland	2.8	21%
	3	Germany	3.1	19%	Germany	3.0	18%
	4	Austria	3.1	17%	Austria	3.2	21%
	5	UK	3.2	17%	France	3.5	5%

Source: Nation Brands Index 2021. Q: Considering everything that is important to you when planning a holiday; please rate the following possible destinations from most likely to be your next holiday destination (1) to least likely to be your next holiday destination (5).