

# Understanding Welcome

Foresight – issue 159

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# Introduction

- This edition of Foresight looks at the results of a VisitBritain sponsored question in the GfK Nation Brands Index 2017. The research sought to explore some of the many elements of “welcome”.
- The research question posed to respondents in each of the 20\* nations was:  
***“When thinking about taking a holiday or vacation abroad, how important are the following elements in making you feel welcome?”***

Before a holiday	During a holiday	
Easy visa application	Convenient opening times	Ease of getting around
Exciting and interesting culture	Signs/information in my language	Clean streets
Tolerant of diversity	Positive interaction with locals	Smiling faces
Accommodating of tourists	Helpful hotel staff	Authentic experiences
Perception of people in the country	Friendly service in restaurant	Familiar comforts
Country's image in the media/news	Stress-free airport experience	Friendly staff at border
Country's image in literature, film and TV	Food that appeals to me	

- The report first looks at the global results. There is then a slide dedicated to the results of each panel country in alphabetical order. More information on the GfK NBI can be found in the Appendix of this report.
- The focus was on what would make travellers feel welcome on holiday in general, not specifically when visiting the UK.

\*While the UK is a panel country in the GfK Anholt Nation Brands Index, UK results have been included in the global results but not reported separately.

# Understanding Welcome – Summary (1)

- In this study we tested a number of elements of Welcome, some which will be influential before the trip, during the planning stages, and other elements which are experienced once a visitor is on holiday and has arrived at their destination.
- It is apparent that Welcome, in relation to a holiday, is composed of many elements and all of these are important – with no one single element standing out. More than half of global respondents rated each of the 20 dimensions of Welcome as quite or very important. With few respondents rating any dimension as “not at all important”, a destination cannot afford to fall down in any area of the visitor experience if a traveller is to feel welcome.
- At the top of the list for feelings of welcome are holiday destinations that are seen as “accommodating of tourists”, followed by the ease of getting around the destination once they have arrived. The ease of getting a visa also ranks highly. These all speak to the traveller’s desire to have an easy, hassle-free experience before and during their holiday.
- Interaction with locals at a holiday destination also play a part with welcome – they are central to half of the top 8 welcome elements (*accommodating of tourists, positive interaction with locals, helpful hotel staff and friendly service at restaurants*).

# Understanding Welcome – Summary (2)

- A country being “tolerant of diversity” was the sixth highest scoring element of Welcome out of the 20 included in the survey.
- The broader image of the country, whether in the media/news or in literature/film/TV, was less important than the other aspects of Welcome, although were still rated as very or quite important by most respondents.
- The dimensions of Welcome where responses varied most by market were “signs/information in my language” and “Country's image in literature, film & TV”.
- With the exception of a “country's image in literature, film and TV” women tended to say all welcome elements looked at in the study were more important than men.
- For the older cohort (aged 45+) “ease of getting around” was important to the majority. The under 44s had higher proportions agreeing the image of a holiday destination in the media and literature was important for welcome – perhaps highlighting the importance of social media in their lives. Dimensions relating to comfort had the highest levels of agreement amongst 35-44 year olds – clean streets, convenient opening times and familiar comforts.

# Market summary

- By market the results do highlight some differences, including:
  - An easy visa application process was in the top 3 important welcoming elements for respondents from **Argentina, Brazil, China, Egypt, India, Mexico, Russia, South Africa** and **Turkey**. At the time of writing, only residents of Argentina, Brazil and Mexico from this list need a visa to visit the UK as a tourist.
  - The UK's major English speaking long haul markets of **Australia, Canada** and **USA** all put “ease of getting around” in the top 3 as important welcome elements.
  - “Exciting and interesting culture” is an important (top 4) welcome element before the trip for **France, Germany, Italy, Poland** and **Sweden**. This is an NBI attribute the UK typically performs well in (ranked 3rd in 2017) and is an important differentiator as the UK competes in a increasingly competitive international tourist market.
  - “Country's image in the media/news” was rated as more important by East Asian respondents (**China, Japan, South Korea**) than those from other countries.
  - On all welcome elements measured, the “quite important” option received the highest proportion of responses in **Japan** and **South Korea** – perhaps an indication of Japanese and Korean survey response patterns rather than a conclusion that nothing is “very” important.



NBI welcome

# The UK's NBI welcome



- In the 2017 GFK Nation Brands Index the UK is ranked 6<sup>th</sup> on the **People** dimension. Within this dimension is the **Welcome** attribute:

*If visited, people would make me feel very welcome*

- In 2017 the UK's NBI rank for Welcome, at the global level, was 13<sup>th</sup> out of 50 nations. Our highest ever Welcome rank was 10<sup>th</sup> in 2014. Differences in this rank by market are explored from page 13.
- Welcome has been, and continues to be an area of relative weakness for the UK – it does not rank as highly as other attributes measured in NBI, such as culture.
- *For more, please refer to our report Foresight 158: How the world views Britain*



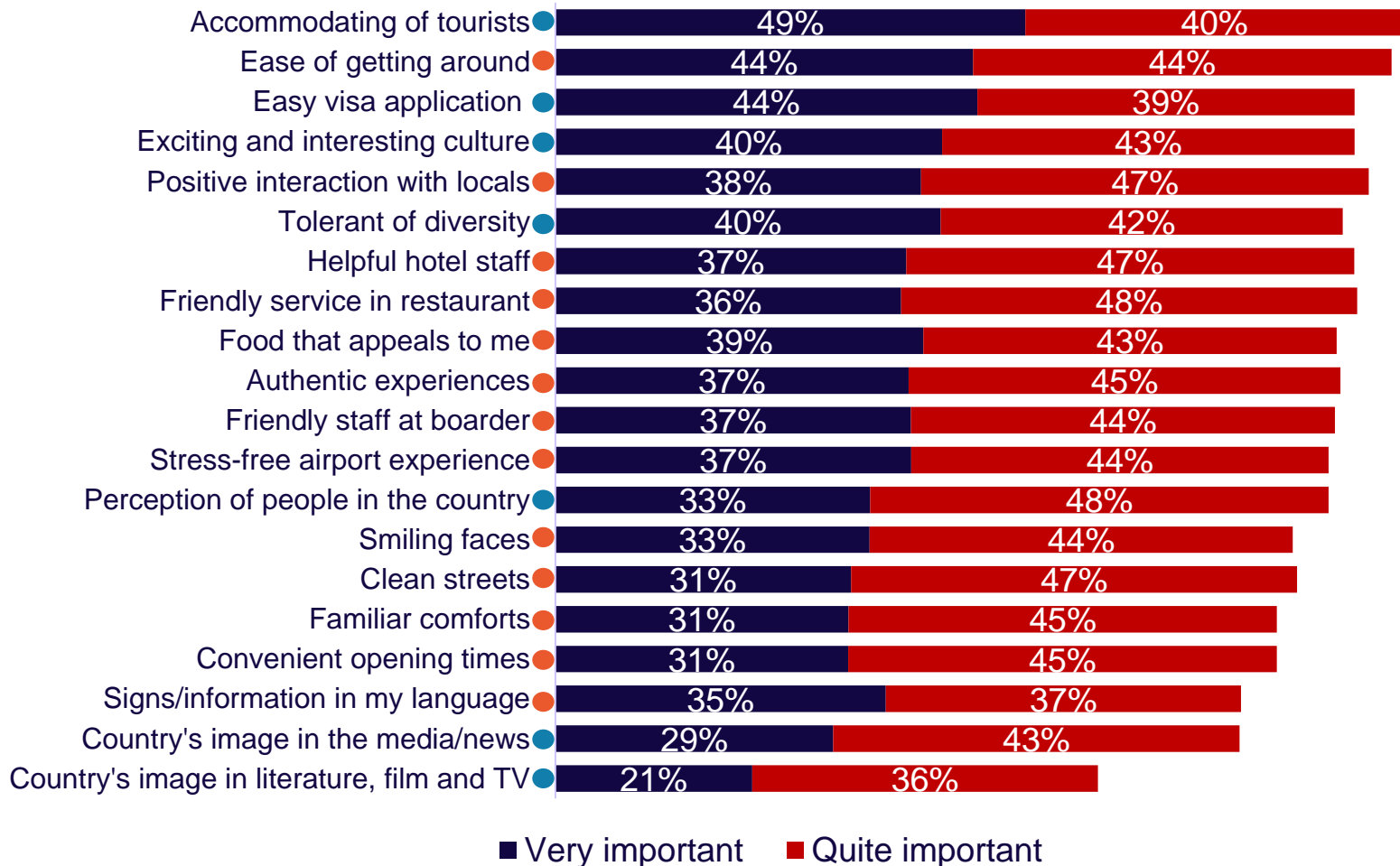


# Elements of welcome

# Elements of welcome

Welcome element:

- Before a holiday
- During a holiday



# Market summary - variation heat map

Welcome element:

- Before a holiday
- During a holiday

Overall strength of factor score indexed to global average, globally adjusted (for more details, see Appendix)

- Accommodating of tourists
- Ease of getting around
- Easy visa application
- Exciting and interesting culture
- Positive interaction with locals
- Tolerant of diversity
- Helpful hotel staff
- Friendly service in restaurant
- Food that appeals to me
- Authentic experiences
- Friendly staff at border
- Stress-free airport experience
- Perception of people in the country
- Smiling faces
- Clean streets
- Familiar comforts
- Convenient opening times
- Signs/information in my language
- Country's image in the media/news
- Country's image in literature, film & TV

	GLOBAL	Argentina	Australia	Brazil	Canada	China	Egypt	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	South Africa	South Korea	Sweden	Turkey	USA
Accommodating of tourists	78%	76%	79%	73%	79%	77%	78%	79%	79%	76%	81%	80%	77%	79%	80%	80%	77%	85%	77%	77%
Ease of getting around	76%	78%	76%	75%	76%	75%	78%	78%	74%	72%	77%	76%	75%	76%	77%	77%	79%	77%	76%	75%
Easy visa application	75%	78%	73%	74%	71%	74%	78%	70%	73%	76%	74%	69%	79%	73%	78%	78%	73%	77%	75%	71%
Exciting and interesting culture	73%	81%	72%	73%	73%	71%	70%	77%	74%	73%	77%	62%	76%	74%	76%	72%	71%	78%	73%	75%
Positive interaction with locals	73%	74%	74%	72%	73%	72%	70%	77%	74%	72%	73%	70%	72%	75%	77%	72%	72%	79%	72%	75%
Tolerant of diversity	73%	73%	71%	74%	73%	73%	75%	74%	77%	71%	74%	69%	71%	73%	77%	72%	72%	76%	70%	71%
Helpful hotel staff	72%	69%	72%	72%	73%	69%	72%	71%	74%	70%	71%	75%	71%	74%	72%	73%	69%	80%	71%	72%
Friendly service in restaurant	72%	70%	72%	72%	73%	71%	71%	71%	74%	71%	71%	73%	71%	72%	73%	73%	69%	80%	72%	72%
Food that appeals to me	72%	71%	73%	73%	75%	72%	66%	71%	77%	69%	73%	75%	70%	75%	73%	69%	73%	72%	68%	73%
Authentic experiences	72%	76%	73%	71%	73%	70%	65%	75%	76%	70%	73%	65%	74%	70%	73%	74%	65%	76%	70%	75%
Friendly staff at border	72%	72%	73%	74%	71%	70%	71%	68%	71%	72%	70%	71%	74%	73%	71%	74%	68%	75%	72%	71%
Stress-free airport experience	71%	73%	72%	73%	73%	67%	71%	69%	75%	71%	67%	72%	68%	73%	71%	74%	68%	69%	73%	71%
Perception of people in the country	70%	67%	68%	69%	68%	69%	67%	71%	77%	70%	71%	69%	68%	72%	70%	67%	71%	78%	72%	69%
Smiling faces	68%	58%	71%	64%	69%	70%	70%	72%	68%	68%	77%	71%	65%	69%	61%	66%	69%	68%	74%	67%
Clean streets	68%	65%	68%	70%	69%	70%	72%	69%	64%	70%	68%	71%	66%	65%	68%	66%	70%	63%	70%	69%
Familiar comforts	67%	67%	67%	68%	68%	68%	72%	63%	62%	70%	67%	68%	65%	64%	72%	65%	69%	62%	68%	67%
Convenient opening times	67%	67%	66%	69%	65%	66%	72%	63%	64%	68%	63%	69%	69%	68%	65%	64%	71%	68%	66%	67%
Signs/information in my language	66%	72%	72%	68%	70%	70%	70%	64%	58%	66%	62%	69%	72%	63%	66%	71%	66%	40%	64%	71%
Country's image in the media/news	65%	64%	63%	66%	64%	71%	63%	63%	64%	68%	61%	69%	66%	65%	56%	67%	69%	59%	65%	65%
Country's image in literature, film & TV	55%	53%	51%	57%	50%	62%	55%	59%	50%	61%	56%	62%	58%	56%	50%	51%	64%	44%	57%	52%

Source: GfK Anholt Nation Brands Index 2017, VisitBritain sponsored question. Base: 20,185. Results indexed to global average with market adjustment used.

When thinking about taking a holiday or vacation abroad, how important are the following elements in making you feel welcome?

# Demographic variation

Welcome element:

- Before a holiday
- During a holiday

% Very and Quite important

	Male	Female
● Accommodating of tourists	87%	90%
● Ease of getting around	85%	90%
● Easy visa application	81%	86%
● Exciting and interesting culture	81%	86%
● Positive interaction with locals	83%	87%
● Tolerant of diversity	80%	85%
● Helpful hotel staff	81%	86%
● Friendly service in restaurant	82%	86%
● Food that appeals to me	80%	83%
● Authentic experiences	80%	85%
● Friendly staff at border	80%	84%
● Stress-free airport experience	79%	83%
● Perception of people in the country	79%	83%
● Smiling faces	75%	79%
● Clean streets	76%	80%
● Familiar comforts	74%	77%
● Convenient opening times	74%	77%
● Signs/information in my language	69%	74%
● Country's image in the media/news	70%	73%
● Country's image in literature, film and TV	57%	57%

	Gender	
	Male	Female
● Accommodating of tourists	87%	90%
● Ease of getting around	85%	90%
● Easy visa application	81%	86%
● Exciting and interesting culture	81%	86%
● Positive interaction with locals	83%	87%
● Tolerant of diversity	80%	85%
● Helpful hotel staff	81%	86%
● Friendly service in restaurant	82%	86%
● Food that appeals to me	80%	83%
● Authentic experiences	80%	85%
● Friendly staff at border	80%	84%
● Stress-free airport experience	79%	83%
● Perception of people in the country	79%	83%
● Smiling faces	75%	79%
● Clean streets	76%	80%
● Familiar comforts	74%	77%
● Convenient opening times	74%	77%
● Signs/information in my language	69%	74%
● Country's image in the media/news	70%	73%
● Country's image in literature, film and TV	57%	57%

	Age					
	18-24	25-34	35-44	45-54	55-64	65+
● Accommodating of tourists	84%	87%	89%	92%	92%	92%
● Ease of getting around	83%	86%	89%	89%	91%	92%
● Easy visa application	82%	83%	84%	86%	85%	83%
● Exciting and interesting culture	81%	84%	85%	84%	84%	82%
● Positive interaction with locals	81%	84%	87%	87%	87%	87%
● Tolerant of diversity	82%	83%	84%	83%	83%	78%
● Helpful hotel staff	78%	82%	84%	87%	88%	87%
● Friendly service in restaurant	80%	82%	85%	86%	88%	87%
● Food that appeals to me	78%	81%	83%	84%	85%	80%
● Authentic experiences	80%	82%	83%	84%	83%	82%
● Friendly staff at border	77%	80%	83%	84%	85%	84%
● Stress-free airport experience	76%	79%	82%	83%	85%	84%
● Perception of people in the country	79%	80%	81%	83%	82%	81%
● Smiling faces	71%	75%	79%	80%	81%	81%
● Clean streets	74%	77%	81%	79%	78%	77%
● Familiar comforts	72%	77%	78%	76%	76%	73%
● Convenient opening times	74%	77%	78%	76%	73%	70%
● Signs/information in my language	69%	73%	74%	72%	71%	69%
● Country's image in the media/news	70%	74%	75%	72%	69%	61%
● Country's image in literature, film and TV	60%	61%	61%	52%	52%	43%



# Elements of welcome by market

# Argentina

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Exciting and interesting culture	50%	37%	10%	3%
● Ease of getting around	43%	42%	12%	3%
● Easy visa application	48%	34%	14%	5%
● Authentic experiences	41%	40%	15%	4%
● Accommodating of tourists	39%	44%	13%	4%
● Positive interaction with locals	34%	48%	14%	4%
● Stress-free airport experience	37%	41%	17%	5%
● Tolerant of diversity	38%	39%	17%	6%
● Signs/information in my language	39%	36%	19%	6%
● Friendly staff at border	36%	40%	18%	6%
● Food that appeals to me	35%	40%	19%	6%
● Friendly service in restaurant	29%	47%	19%	4%
● Helpful hotel staff	28%	47%	19%	5%
● Perception of people in the country	26%	47%	20%	6%
● Convenient opening times	29%	40%	24%	7%
● Familiar comforts	27%	44%	22%	7%
● Clean streets	24%	44%	24%	7%
● Country's image in the media/news	28%	38%	26%	9%
● Smiling faces	20%	37%	31%	12%
● Country's image in books/film/TV	19%	30%	35%	16%



In the 2017 Nation Brands Index, the UK was ranked 35<sup>th</sup> out of 50 nations for **Welcome** amongst those from Argentina.

There are a number of traditionally strong NBI attributes where the UK is in the top 10, such as culture and authentic experiences, that Argentinians consider very important for a warm welcome when travelling.

Ease of getting around was considered important by the majority of respondents (85%). It is worth noting that visitors from Argentina do not currently need a visa to enter the UK, which is considered a very important element of welcome for 82% of Argentinians.

# Australia

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	51%	41%	5%	2%
● Ease of getting around	47%	42%	9%	2%
● Positive interaction with locals	41%	48%	8%	2%
● Food that appeals to me	42%	45%	11%	2%
● Easy visa application	44%	41%	12%	3%
● Authentic experiences	40%	48%	9%	3%
● Friendly staff at border	40%	46%	11%	3%
● Signs/information in my language	42%	42%	14%	3%
● Helpful hotel staff	38%	49%	11%	3%
● Stress-free airport experience	40%	46%	12%	3%
● Exciting and interesting culture	37%	49%	10%	4%
● Friendly service in restaurant	36%	50%	11%	3%
● Tolerant of diversity	37%	48%	11%	4%
● Smiling faces	36%	50%	12%	3%
● Perception of people in the country	29%	56%	12%	3%
● Clean streets	31%	50%	16%	3%
● Familiar comforts	32%	48%	17%	3%
● Convenient opening times	30%	47%	17%	5%
● Country's image in the media/news	28%	45%	20%	7%
● Country's image in books/film/TV	17%	36%	35%	13%



The UK was ranked 4<sup>th</sup> for **Welcome** in 2017 by respondents from Australia – the highest welcome rank the UK received in 2017.

In terms of important elements to Australians feeling welcome when holidaying abroad, being accommodating of tourists received the highest levels of strong agreement. This is followed closely by ease of getting around.

The image of a holiday destination in traditional media such as the news and books is quite important to some, but these are generally ranked towards the bottom of the importance list.

# Brazil

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Ease of getting around	50%	39%	8%	3%
● Tolerant of diversity	52%	33%	11%	4%
● Easy visa application	50%	37%	10%	4%
● Friendly staff at border	48%	39%	10%	4%
● Accommodating of tourists	47%	38%	12%	3%
● Exciting and interesting culture	49%	35%	12%	4%
● Stress-free airport experience	47%	38%	11%	4%
● Food that appeals to me	45%	42%	9%	4%
● Friendly service in restaurant	44%	43%	9%	4%
● Positive interaction with locals	46%	39%	11%	4%
● Helpful hotel staff	45%	39%	13%	3%
● Authentic experiences	43%	39%	13%	5%
● Clean streets	40%	41%	15%	3%
● Convenient opening times	39%	42%	15%	4%
● Perception of people in the country	41%	40%	15%	5%
● Signs/information in my language	41%	36%	17%	6%
● Familiar comforts	38%	40%	17%	5%
● Country's image in the media/news	39%	36%	20%	6%
● Smiling faces	30%	43%	21%	5%
● Country's image in books/film/TV	28%	31%	31%	10%



The UK was ranked 13<sup>th</sup> for **Welcome** in 2017 by respondents from Brazil – the highest ever welcome rank the UK has had from this market.

Being tolerant of diversity attracted the highest proportion choosing “very important”.

Half of all respondents indicated ease of getting around and an easy visa application process were very important elements for feeling welcome on holiday – Brazilian tourists do not currently need a visa to visit the UK. Brazilians do not necessarily associate familiar comforts as much with welcome but 3 out of 4 did say signs and information in their language were important for feelings of welcome.



# Canada

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	50%	43%	5%	1%
● Ease of getting around	43%	48%	7%	2%
● Food that appeals to me	44%	43%	11%	3%
● Stress-free airport experience	41%	45%	11%	2%
● Helpful hotel staff	37%	51%	10%	2%
● Exciting and interesting culture	38%	50%	9%	3%
● Authentic experiences	38%	49%	11%	2%
● Positive interaction with locals	38%	50%	10%	2%
● Friendly service in restaurant	36%	52%	9%	3%
● Tolerant of diversity	40%	45%	12%	3%
● Friendly staff at border	37%	46%	13%	3%
● Easy visa application	39%	43%	13%	5%
● Signs/information in my language	37%	42%	17%	3%
● Smiling faces	33%	49%	15%	4%
● Clean streets	31%	50%	17%	2%
● Familiar comforts	32%	48%	18%	3%
● Perception of people in the country	28%	55%	13%	4%
● Convenient opening times	28%	46%	20%	5%
● Country's image in the media/news	27%	49%	18%	6%
● Country's image in books/film/TV	16%	36%	32%	16%



The UK was ranked 11<sup>th</sup> for **Welcome** in 2017 by respondents from Canada.

Besides a destination being accommodating of tourists and being easy to get around, high proportions of Canadian respondents also indicated appealing food was a very important element of a welcome.

On the topic of food, the majority of Canadian respondents (88%) also indicated friendly restaurant service was quite or very important for feelings of welcome.

# China

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	50%	44%	4%	2%
● Ease of getting around	45%	47%	7%	1%
● Easy visa application	42%	49%	8%	1%
● Tolerant of diversity	41%	49%	8%	1%
● Positive interaction with locals	38%	50%	10%	1%
● Food that appeals to me	42%	44%	12%	2%
● Exciting and interesting culture	37%	52%	9%	2%
● Country's image in the media/news	37%	50%	12%	1%
● Friendly service in restaurant	35%	52%	11%	1%
● Smiling faces	38%	49%	12%	2%
● Authentic experiences	38%	47%	11%	4%
● Friendly staff at border	35%	53%	10%	2%
● Signs/information in my language	39%	44%	14%	2%
● Clean streets	35%	52%	11%	2%
● Helpful hotel staff	33%	53%	11%	2%
● Perception of people in the country	33%	52%	12%	3%
● Familiar comforts	31%	54%	13%	2%
● Stress-free airport experience	32%	53%	13%	3%
● Convenient opening times	29%	53%	16%	2%
● Country's image in books/film/TV	26%	48%	21%	5%



The UK was ranked a record 6<sup>th</sup> for **Welcome** in 2017 by respondents from China - up 13 places from 2016.

An overwhelming majority of Chinese respondents (94%) said a destination that is accommodating of tourists is important for feelings of welcome.

An easy visa application process is also important with respondents from China – indicating that welcome is not confined to experiences in a destination but start during the holiday research and planning process. In fact, only a third of respondents said a stress-free airport experience was a very important element of welcome.

# Egypt

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Easy visa application	64%	22%	8%	5%
● Accommodating of tourists	62%	26%	8%	5%
● Ease of getting around	60%	28%	8%	4%
● Tolerant of diversity	56%	27%	12%	5%
● Familiar comforts	48%	35%	13%	4%
● Clean streets	49%	33%	13%	5%
● Convenient opening times	49%	33%	13%	5%
● Helpful hotel staff	46%	37%	13%	4%
● Stress-free airport experience	49%	31%	15%	5%
● Friendly staff at border	45%	37%	14%	5%
● Friendly service in restaurant	44%	37%	14%	5%
● Smiling faces	46%	33%	16%	5%
● Signs/information in my language	47%	32%	15%	6%
● Positive interaction with locals	43%	38%	14%	5%
● Exciting and interesting culture	45%	34%	15%	5%
● Perception of people in the country	38%	40%	15%	7%
● Food that appeals to me	41%	33%	19%	8%
● Authentic experiences	37%	37%	18%	8%
● Country's image in the media/news	35%	34%	22%	8%
● Country's image in books/film/TV	26%	33%	28%	12%



The UK was ranked 34<sup>th</sup> for **Welcome** in 2017 by respondents from Egypt – the UK's lowest welcome rank from Egypt since 2014.

An easy visa application process, a destination accommodating of tourists and ease of getting around top the ranking table for very important welcome elements with those from Egypt.

Amongst these respondents all welcome elements we tested received high levels of support. This indicates that welcome is a combination of many elements all with similar weight.

# France

Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	41%	44%	11%	4%
● Ease of getting around	36%	49%	10%	4%
● Exciting and interesting culture	38%	45%	12%	5%
● Positive interaction with locals	35%	49%	12%	4%
● Authentic experiences	33%	49%	14%	5%
● Tolerant of diversity	34%	44%	15%	6%
● Smiling faces	28%	50%	16%	5%
● Friendly service in restaurant	28%	49%	17%	6%
● Perception of people in the country	27%	51%	16%	6%
● Helpful hotel staff	26%	51%	17%	5%
● Food that appeals to me	28%	48%	18%	6%
● Easy visa application	30%	43%	19%	7%
● Stress-free airport experience	27%	46%	20%	7%
● Clean streets	23%	51%	21%	5%
● Friendly staff at border	25%	47%	21%	7%
● Signs/information in my language	24%	40%	25%	10%
● Familiar comforts	20%	46%	26%	8%
● Convenient opening times	21%	45%	25%	10%
● Country's image in the media/news	21%	44%	26%	9%
● Country's image in books/film/TV	19%	39%	29%	12%



The UK was ranked 16<sup>th</sup> for **Welcome** in 2017 by respondents from France.

Across all elements tested there was moderate support across for importance to feelings of a holiday welcome. Half of all respondents indicated clean streets, helpful hotel staff and the perception of people from the country were quite important.

Smiling faces also have a part to play for French holiday travellers with nearly 80% saying a 'smiling face' was at least important.

# Germany

Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	38%	49%	10%	3%
● Food that appeals to me	36%	49%	11%	4%
● Tolerant of diversity	35%	50%	11%	5%
● Perception of people in the country	33%	53%	10%	4%
● Authentic experiences	34%	49%	13%	4%
● Stress-free airport experience	34%	47%	14%	5%
● Helpful hotel staff	30%	53%	12%	5%
● Friendly service in restaurant	29%	53%	14%	4%
● Exciting and interesting culture	32%	48%	14%	5%
● Positive interaction with locals	30%	52%	13%	5%
● Ease of getting around	30%	52%	15%	4%
● Easy visa application	35%	42%	16%	7%
● Friendly staff at border	26%	50%	18%	5%
● Smiling faces	25%	46%	23%	6%
● Clean streets	19%	47%	27%	6%
● Country's image in the media/news	21%	45%	25%	9%
● Convenient opening times	21%	45%	25%	9%
● Familiar comforts	19%	43%	30%	8%
● Signs/information in my language	21%	34%	32%	14%
● Country's image in books/film/TV	12%	35%	34%	19%



The UK was ranked 22<sup>nd</sup> for **Welcome** in 2017 by respondents from Germany.

Being accommodating of tourists was ranked as the highest welcome element amongst those from Germany, with 87% agreeing this was quite or very important.

$\frac{3}{4}$  of respondents indicated that an easy visa application process was important for making them feel welcome – the same proportion who said friendly staff at the border was important.

# India

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Easy visa application	58%	32%	8%	2%
● Accommodating of tourists	59%	31%	7%	3%
● Exciting and interesting culture	52%	36%	9%	3%
● Ease of getting around	49%	39%	9%	3%
● Positive interaction with locals	48%	40%	9%	3%
● Friendly staff at border	49%	38%	11%	3%
● Friendly service in restaurant	45%	42%	11%	3%
● Tolerant of diversity	46%	40%	10%	4%
● Stress-free airport experience	44%	42%	11%	3%
● Helpful hotel staff	45%	41%	12%	3%
● Authentic experiences	45%	41%	12%	3%
● Clean streets	43%	42%	13%	3%
● Perception of people in the country	43%	42%	12%	3%
● Familiar comforts	43%	42%	11%	4%
● Food that appeals to me	43%	41%	13%	3%
● Smiling faces	43%	38%	15%	3%
● Convenient opening times	41%	42%	14%	3%
● Country's image in the media/news	41%	39%	15%	4%
● Signs/information in my language	41%	36%	20%	4%
● Country's image in books/film/TV	32%	39%	23%	7%



The UK was ranked inside the top 10 nations for **Welcome** in 2017 by respondents from India.

An easy visa application process was high on the list of importance of welcome mentioned by Indian respondents in this study. Currently Indian visitors to the UK do need a visa to come to the UK.

This is closely followed by a destination being accommodating to tourists and exciting/interesting culture.

All of the top 3 important welcome elements amongst India respondents are before a holiday, during the research and planning stages.

# Italy

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	52%	37%	9%	2%
● Smiling faces	43%	46%	9%	2%
● Ease of getting around	44%	44%	10%	2%
● Exciting and interesting culture	44%	43%	11%	2%
● Easy visa application	39%	46%	13%	3%
● Tolerant of diversity	40%	43%	12%	4%
● Authentic experiences	38%	47%	12%	4%
● Food that appeals to me	38%	44%	15%	3%
● Positive interaction with locals	36%	48%	14%	3%
● Helpful hotel staff	33%	49%	16%	2%
● Friendly service in restaurant	33%	48%	16%	3%
● Perception of people in the country	31%	52%	14%	3%
● Friendly staff at border	33%	46%	17%	4%
● Clean streets	29%	49%	19%	3%
● Familiar comforts	28%	49%	19%	4%
● Stress-free airport experience	30%	45%	22%	4%
● Convenient opening times	26%	43%	25%	6%
● Signs/information in my language	27%	39%	26%	8%
● Country's image in the media/news	22%	46%	24%	8%
● Country's image in books/film/TV	17%	40%	33%	9%



The UK was ranked 19th out of 50 nations for **Welcome** in 2017 by respondents from Italy. This is the lowest rank the UK has seen for Welcome from this nation.

Over half said that the perception of people at the holiday destination is quite important. This highlights that the important role that local people make in a tourist visit. Helpful staff and friendly restaurant service also have high proportions stating these are quite important element of welcome.

The country's image in traditional media falls to the bottom of the list – although they are still at least quite important for the majority.

# Japan

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	42%	48%	8%	2%
● Ease of getting around	33%	56%	9%	2%
● Food that appeals to me	35%	50%	12%	3%
● Helpful hotel staff	31%	56%	10%	3%
● Friendly service in restaurant	29%	54%	15%	2%
● Stress-free airport experience	28%	56%	14%	2%
● Smiling faces	28%	52%	17%	3%
● Friendly staff at border	26%	56%	15%	3%
● Clean streets	27%	53%	18%	2%
● Positive interaction with locals	23%	59%	14%	3%
● Easy visa application	24%	56%	17%	4%
● Country's image in the media/news	25%	55%	17%	4%
● Signs/information in my language	29%	47%	20%	4%
● Perception of people in the country	22%	58%	17%	3%
● Convenient opening times	23%	55%	18%	3%
● Tolerant of diversity	24%	54%	19%	3%
● Familiar comforts	23%	55%	19%	3%
● Authentic experiences	18%	54%	25%	3%
● Country's image in books/film/TV	18%	49%	28%	5%
● Exciting and interesting culture	17%	49%	29%	5%



The UK was ranked 20th for **Welcome** in 2017. This still ranks the UK in the top half of the table (out of 50 nations) amongst those from Japan.

It is interesting to note that on all welcome elements measured the highest proportion is in the “Quite important” category – perhaps an indication of the Japanese cultural response patterns to surveys rather than a conclusion that nothing is very important. A destination being “accommodating of tourists” is ranked top, but ease of getting around and appealing food are also both ranked highly in terms of elements important to feelings of welcome. Exciting and interesting culture and authentic experiences fall to the bottom of the list.



# Mexico

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Easy visa application	62%	29%	6%	2%
● Accommodating of tourists	56%	36%	7%	2%
● Exciting and interesting culture	55%	34%	9%	2%
● Ease of getting around	52%	37%	9%	2%
● Friendly staff at border	52%	36%	9%	3%
● Authentic experiences	50%	39%	9%	3%
● Positive interaction with locals	45%	42%	10%	3%
● Signs/information in my language	49%	34%	14%	3%
● Friendly service in restaurant	44%	43%	11%	2%
● Tolerant of diversity	49%	34%	12%	5%
● Helpful hotel staff	44%	41%	12%	3%
● Food that appeals to me	43%	40%	13%	3%
● Convenient opening times	43%	39%	14%	4%
● Stress-free airport experience	43%	37%	16%	4%
● Perception of people in the country	39%	41%	17%	2%
● Clean streets	35%	47%	15%	4%
● Country's image in the media/news	37%	40%	19%	4%
● Familiar comforts	36%	41%	18%	5%
● Smiling faces	36%	39%	20%	5%
● Country's image in books/film/TV	30%	32%	31%	7%



The UK was ranked 16th for **Welcome** in 2017 – just one rank behind the record holding 2012 of 15<sup>th</sup> place.

An easy visa application process received the highest levels of strong agreement in terms of its importance to welcome. While nearly 90% said friendly staff at the border were important for welcome, smiling faces received lower levels of agreement with only 75% agreeing on this welcome element.

Exciting and interesting culture as well as authentic experiences were important welcome elements for Mexican holiday makers.

# Poland

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	51%	38%	8%	4%
● Ease of getting around	40%	48%	8%	4%
● Food that appeals to me	41%	45%	11%	3%
● Positive interaction with locals	39%	48%	10%	4%
● Helpful hotel staff	38%	46%	11%	4%
● Exciting and interesting culture	39%	45%	11%	5%
● Tolerant of diversity	39%	43%	13%	5%
● Easy visa application	41%	42%	12%	6%
● Stress-free airport experience	37%	47%	12%	4%
● Friendly staff at border	37%	46%	12%	4%
● Friendly service in restaurant	34%	52%	10%	5%
● Perception of people in the country	33%	51%	12%	4%
● Authentic experiences	32%	46%	18%	4%
● Smiling faces	31%	47%	17%	5%
● Convenient opening times	29%	50%	16%	6%
● Clean streets	24%	50%	20%	6%
● Country's image in the media/news	27%	45%	20%	8%
● Familiar comforts	25%	45%	23%	7%
● Signs/information in my language	31%	35%	22%	12%
● Country's image in books/film/TV	19%	39%	31%	12%



The UK was ranked 23rd for **Welcome** in 2017 – one of the UK’s weaker NBI attributes from Poland. The weakest performing attribute was natural beauty (40th).

While “accommodating of tourists” and ease of getting around top the list for important welcome elements, appealing food is also important. In addition, 86% said it was important that there was friendly service in a restaurant – the highest proportion for “quite important”.

Familiar comforts fell down the list; however these were still very important to a quarter of respondents from Poland.

# Russia

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	48%	39%	9%	4%
● Easy visa application	45%	41%	10%	4%
● Tolerant of diversity	42%	43%	9%	5%
● Positive interaction with locals	39%	49%	9%	4%
● Ease of getting around	40%	46%	10%	3%
● Exciting and interesting culture	41%	42%	12%	4%
● Food that appeals to me	35%	46%	15%	4%
● Friendly service in restaurant	34%	49%	13%	4%
● Authentic experiences	35%	45%	17%	4%
● Familiar comforts	35%	45%	16%	4%
● Helpful hotel staff	31%	50%	15%	4%
● Stress-free airport experience	32%	47%	16%	5%
● Friendly staff at border	33%	45%	17%	5%
● Perception of people in the country	27%	52%	16%	5%
● Clean streets	25%	52%	20%	4%
● Signs/information in my language	31%	37%	23%	9%
● Convenient opening times	26%	44%	24%	7%
● Smiling faces	21%	43%	28%	8%
● Country's image in the media/news	18%	39%	30%	13%
● Country's image in books/film/TV	14%	33%	36%	16%



Russians ranked the UK's **Welcome** in 34<sup>th</sup> place in 2017 – this is 2 ranks higher than in 2016.

Being tolerant of diversity comes in third place in terms of importance to welcome when the Russia scores are ranked by index score (85%). The top 3 important welcome elements are all before a holiday – suggesting a welcome begins during the holiday research and planning stage for Russian travellers.

With 88% saying positive interaction with locals was important to welcome, this is the one element that has the highest levels of agreement amongst Russians.

# South Africa

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	62%	31%	5%	1%
● Easy visa application	60%	29%	10%	1%
● Ease of getting around	53%	39%	7%	1%
● Stress-free airport experience	51%	36%	11%	2%
● Friendly staff at border	49%	38%	12%	2%
● Authentic experiences	48%	40%	11%	2%
● Helpful hotel staff	47%	42%	9%	2%
● Friendly service in restaurant	45%	42%	11%	2%
● Positive interaction with locals	43%	45%	10%	2%
● Tolerant of diversity	48%	35%	13%	3%
● Exciting and interesting culture	44%	42%	12%	2%
● Signs/information in my language	48%	34%	14%	4%
● Food that appeals to me	42%	39%	16%	3%
● Perception of people in the country	38%	41%	18%	4%
● Country's image in the media/news	39%	37%	20%	4%
● Smiling faces	37%	41%	18%	4%
● Clean streets	34%	43%	20%	3%
● Familiar comforts	35%	40%	21%	4%
● Convenient opening times	33%	42%	20%	5%
● Country's image in books/film/TV	22%	30%	35%	13%



The UK was ranked 7<sup>th</sup> for **Welcome** in 2017. Generally the UK ranks very highly across all tourism attributes in the NBI amongst South Africans, with the 7<sup>th</sup> place for Welcome attracting one of the lowest ranks.

Initial interaction at the holiday destination is important amongst tourists from South Africa. A stress free airport and friendly border staff both in the top 5 elements important to welcome. Just ahead of these is ease of getting around.

In summary, 3 of the top 5 important welcome elements are experiences and interactions once on holiday, indicating a welcome extends well beyond the planning period and includes time on holiday.

# South Korea

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Ease of getting around	42%	43%	10%	4%
● Accommodating of tourists	35%	50%	12%	3%
● Food that appeals to me	31%	49%	15%	4%
● Easy visa application	29%	52%	15%	4%
● Tolerant of diversity	29%	50%	15%	5%
● Positive interaction with locals	28%	52%	16%	4%
● Exciting and interesting culture	28%	51%	16%	6%
● Perception of people in the country	27%	51%	17%	5%
● Convenient opening times	26%	52%	18%	4%
● Clean streets	25%	53%	18%	4%
● Friendly service in restaurant	22%	56%	18%	4%
● Familiar comforts	24%	52%	18%	6%
● Country's image in the media/news	24%	51%	20%	5%
● Smiling faces	24%	51%	21%	5%
● Helpful hotel staff	24%	51%	19%	5%
● Stress-free airport experience	24%	52%	19%	6%
● Friendly staff at border	25%	49%	21%	6%
● Signs/information in my language	26%	40%	28%	6%
● Authentic experiences	19%	52%	22%	6%
● Country's image in books/film/TV	19%	49%	26%	6%



The UK was ranked 9<sup>th</sup> for **Welcome** in 2017, up 3 rank places on the 2016 rank.

On all welcome elements measured the highest proportion is in the 'quite important' category – this is a pattern also seen in results from Japan and most probably cultural as opposed to concluding that no single element is very important.

Of note is friendly service in restaurants. While only 22% agree this is very important, when combined with those who said this is quite important, over 2/3rds said this was an important element of welcome on holiday.

# Sweden

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	45%	43%	9%	2%
● Friendly service in restaurant	35%	50%	12%	3%
● Helpful hotel staff	35%	49%	12%	3%
● Positive interaction with locals	36%	48%	12%	4%
● Perception of people in the country	33%	50%	14%	3%
● Exciting and interesting culture	36%	45%	16%	4%
● Ease of getting around	29%	54%	14%	3%
● Easy visa application	37%	41%	15%	7%
● Tolerant of diversity	33%	46%	15%	6%
● Authentic experiences	31%	48%	17%	4%
● Friendly staff at border	31%	46%	18%	5%
● Food that appeals to me	29%	45%	21%	5%
● Stress-free airport experience	25%	44%	26%	6%
● Convenient opening times	22%	47%	24%	7%
● Smiling faces	22%	46%	26%	6%
● Clean streets	18%	42%	32%	8%
● Familiar comforts	18%	40%	32%	10%
● Country's image in the media/news	19%	36%	30%	15%
● Country's image in books/film/TV	10%	26%	40%	25%
● Signs/information in my language	11%	20%	37%	32%



The UK was ranked 9<sup>th</sup> for **Welcome** in 2017.

Being accommodating of tourists was important to the majority of respondents from Sweden.

The locals of a holiday destination feature highly in terms of welcome with visitors from Sweden. Friendly staff in restaurants and hotels take 2<sup>nd</sup> and 3<sup>rd</sup> place respectively. These are followed by positive interactions with locals to make up the top 4 important welcome elements.

An easy visa application process was very important for feelings of welcome for a little over a third of respondents from Sweden when on holiday.

# Turkey

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	53%	34%	10%	3%
● Ease of getting around	50%	36%	10%	4%
● Easy visa application	52%	31%	11%	6%
● Smiling faces	48%	37%	11%	5%
● Stress-free airport experience	46%	37%	13%	4%
● Exciting and interesting culture	44%	40%	11%	5%
● Positive interaction with locals	44%	39%	13%	4%
● Friendly staff at border	45%	37%	13%	6%
● Perception of people in the country	43%	39%	15%	4%
● Friendly service in restaurant	41%	43%	12%	4%
● Helpful hotel staff	40%	43%	12%	5%
● Tolerant of diversity	42%	38%	13%	7%
● Authentic experiences	38%	43%	14%	5%
● Clean streets	37%	44%	13%	5%
● Familiar comforts	37%	40%	19%	5%
● Food that appeals to me	38%	37%	20%	5%
● Convenient opening times	35%	39%	18%	8%
● Country's image in the media/news	33%	38%	23%	6%
● Signs/information in my language	34%	36%	20%	10%
● Country's image in books/film/TV	26%	34%	29%	11%



The UK was ranked 25<sup>th</sup> for **Welcome** in 2017 – the highest ever ranking and up 9 places from 2016.

A holiday destination that is accommodating of tourists was the most important welcome element, with half of respondents from Turkey saying that this was very important.

In general, welcome is a made up of a mixture of many elements. The welcome element that received the lowest level of agreement was the country's image in books/film/TV, with 60% saying that this is at least quite important. The next lowest was signs/information in the traveller's own language, although this was important to almost  $\frac{3}{4}$  of respondents.

# USA

## Welcome element:

- Before a holiday
- During a holiday

	Very important	Quite important	Not very important	Not at all important
● Accommodating of tourists	56%	34%	7%	3%
● Exciting and interesting culture	50%	38%	9%	3%
● Ease of getting around	50%	40%	7%	3%
● Authentic experiences	48%	41%	8%	3%
● Positive interaction with locals	47%	42%	9%	3%
● Food that appeals to me	47%	38%	10%	5%
● Helpful hotel staff	44%	42%	11%	3%
● Friendly service in restaurant	43%	43%	10%	4%
● Signs/information in my language	46%	36%	13%	5%
● Easy visa application	44%	39%	11%	5%
● Tolerant of diversity	45%	38%	12%	5%
● Friendly staff at border	41%	43%	12%	3%
● Stress-free airport experience	43%	40%	13%	4%
● Clean streets	40%	41%	15%	4%
● Perception of people in the country	40%	41%	14%	5%
● Familiar comforts	38%	41%	16%	5%
● Convenient opening times	36%	44%	15%	5%
● Smiling faces	37%	42%	17%	5%
● Country's image in the media/news	36%	38%	19%	7%
● Country's image in books/film/TV	22%	33%	30%	15%



The UK was ranked 5<sup>th</sup> for **Welcome** in 2017 – the UK's joint highest welcome rank from all 20 panel nations (the UK's welcome was also ranked 5<sup>th</sup> by Australia).

An exciting and interesting culture was important to the vast majority of respondents (88%) from America. With 90% saying the ease of getting around was importance, this was the welcome element that had the highest proportion of total importance.

While the image of a destination in traditional media such as the news and books was quite important, there are generally ranked towards the bottom of the list, in terms of welcome elements.



# Further resources

VisitBritain regularly publishes up to date inbound research. Below are some recent reports and links to the visualisation on our website for further information:

*Foresight 150: Planning and Researching a holiday*

<https://www.visitbritain.org/understanding-international-visitors>

*Foresight 151: Booking a holiday*

<https://www.visitbritain.org/understanding-international-visitors>

*Foresight 154: The Visitor Experience in Britain*  
(Welcome, Expectations, Satisfaction and Recommendation)

<https://www.visitbritain.org/britains-welcome>

*Foresight 158: How the world views Britain*

(Summary of the key UK findings from the 2017 GFK Anholt Nation Brands Index)

<https://www.visitbritain.org/britain%E2%80%99s-image-overseas>

Inbound culture, heritage and attractions research

<https://www.visitbritain.org/inbound-culture-heritage-attractions-research>

Market Profiles

(in-depth market summaries for many of the UK's inbound markets included in this report)

<https://www.visitbritain.org/markets>

International Passenger Survey data latest quarterly data

(Explore IPS data, by country of residence)

<https://www.visitbritain.org/latest-quarterly-data-uk-overall>

# Appendix

- 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.
- 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.
- On page 11, indexing has been used so comparisons can be made across nations as we know different cultures have a tendency to respond to surveys in a much more positive way than others. To index we have completed 2 steps:
  - STEP 1: calculate market adjustment within each nation, for each welcome element:  $= ((\text{'very important'}*3)+(\text{'quite important'}*2)+(\text{'not very important'})) / 3$ .
  - STEP 2: summed percentage of each nation across all welcome elements proportioned to global average so the total score for all individual nations equals the total score for global percentages.
- Fieldwork was conducted in July 2017.
- The icons are all designed by Freepik and distributed by Flaticon



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