

C B I 0 8

COUNTRY BRAND INDEX 2008: **INSIGHTS, FINDINGS & COUNTRY RANKINGS**

AUS – 1.00   CAN ▲ 2.00   USA ▼ 3.00   ITA ▲ 4.00   CHE ▲ 5.00   FRA

FRIENDLY LOCALS • FAMILIES • VALUE FOR MONEY • RISING STAR • STANDARD OF LIVING • IDEAL FOR BUSINESS • EXTEND A BUSINESS TRIP • CONFERENCES • POLITICAL FREEDOM • EASIEST TO DO BUSINESS

FutureBrand



# Country Branding

This is the fourth year FutureBrand has produced the Country Brand Index, a global study that ranks countries as brands and assesses opportunities, insights and findings related to nation branding. When we started, country branding was still a relatively new concept that often required considerable explanation. Since that time, however, many more countries have started to focus on their brands. Destination and city branding have become more widespread as well; even regions have started looking for ways to harness the power of their brands, which is more critical in this time of global economic crisis.

Three noteworthy limitations have also emerged:

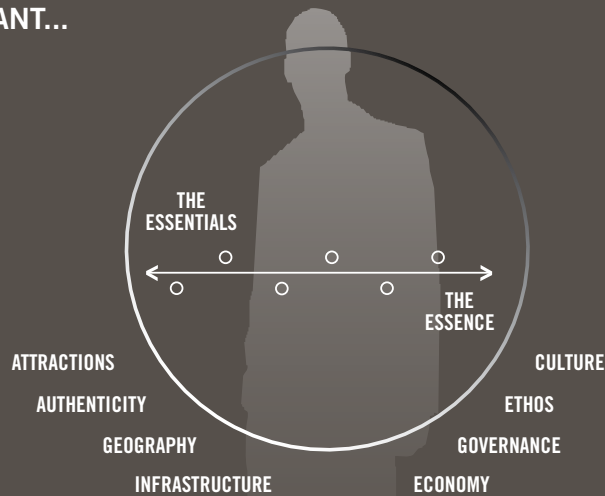
1. Countries generally approach marketing and branding in a decentralized way, which neither maximizes nor effectively leverages the power of the brand across the country, its ministries and its citizens.
2. Country branding is seen as tactical and short term, rather than as an essential strategic activity that requires long-term investment.
3. Country branding has become more generic and “safe” in its approach and implementation. Few brands live up to the special essence of the countries they represent.

# FutureBrand Philosophy

## OUR APPROACH

FutureBrand has a methodology that uniquely addresses the needs of country brands. This approach appreciates the complexity of destinations, while still creating a single-minded brand platform that is easy to understand, work with and embrace.

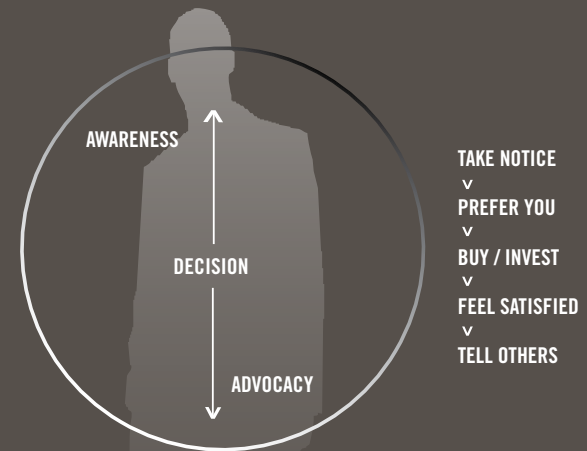
### I WANT...



## FRAMEWORK AND DESIRE

We begin brand development by creating a strategic framework that enables us to identify the core focus of your country brand. This is customized and aims at optimizing your brand to deliver effectively. Using unmatched category insights and combined strengths in consulting and design, we define the opportunity and create both a value proposition for your country and a visual expression for your brand that is ownable, differentiating, enduring and dynamic. We strive to unlock your country's true potential and connect it to what residents, visitors and investors desire.

### MAKE ME...



## DECISION AND MOTIVATION

Our Hierarchical Decision Model (HDM) identifies your country brand's maturity and how residents, visitors and investors (existing and potential) relate to it on a continuum from awareness to advocacy. This helps us understand how and why decisions are made and what can trigger choices to visit or invest. The model also considers what barriers the nation needs to overcome strategically and creatively. These insights allow your brand to be finely tuned to its audiences and their relative requirements. This enables us to build country brands that generate high levels of customer advocacy.

# Overview

This year's Country Brand Index has increased its scope to look at country brands more broadly. It reviews attributes and associations outside of tourism to better appreciate the opportunities and challenges of country branding. This more expansive lens illustrates the diversity of destinations. Unraveling the intricacies of countries and seeing their richness as an advantage, rather than as a hindrance, is one of the powerful benefits and unique aspects of country branding. Instead of using traditional marketing or business approaches established for consumer goods, financial services or technology products, countries should embrace their complexity and factor it into their entire brand-building efforts.



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JPN  
SWE

 AUSTRALIA

 CANADA

 UNITED STATES

 ITALY

 SWITZERLAND

 FRANCE

 NEW ZEALAND

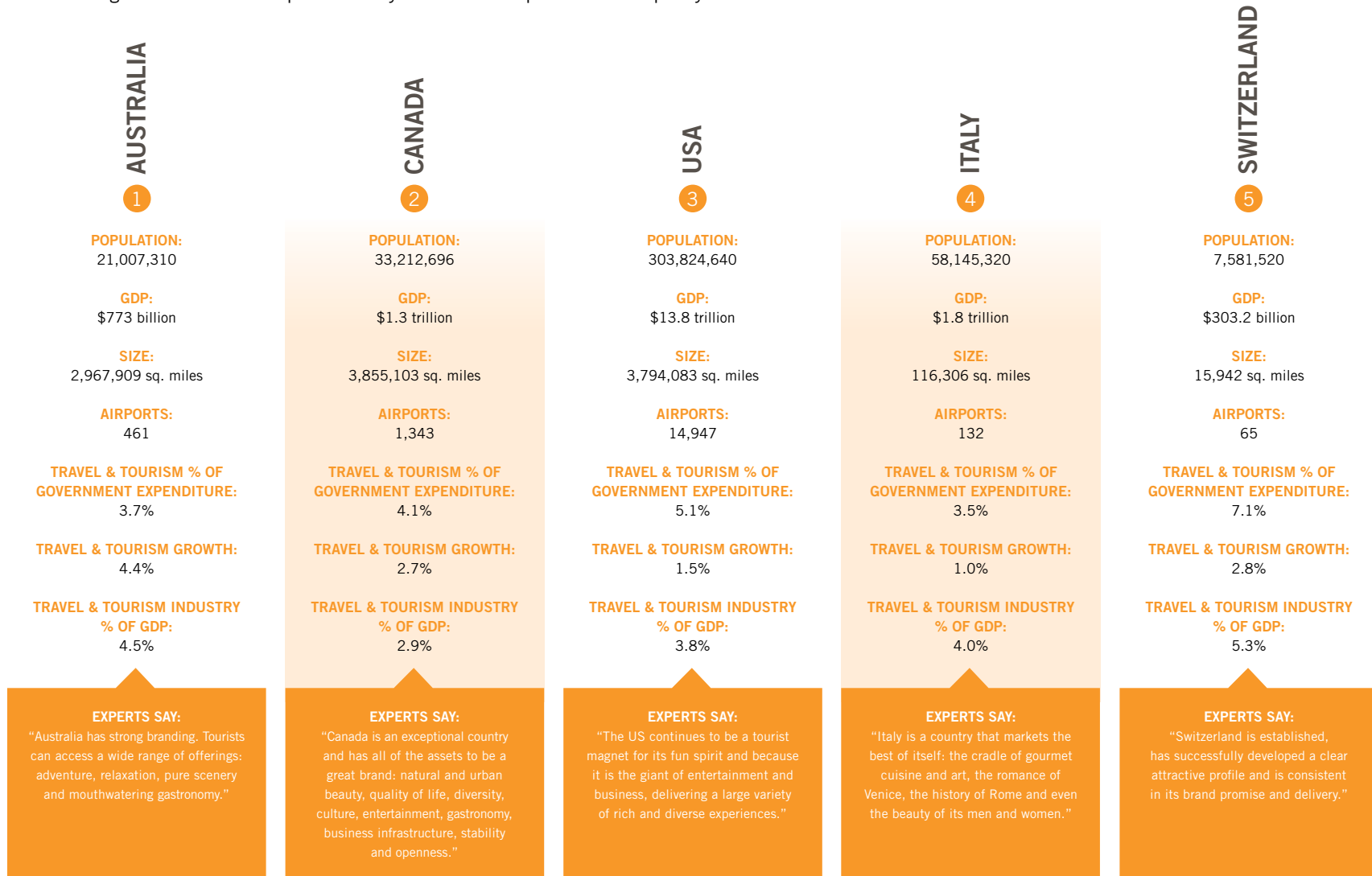
 UNITED KINGDOM

 JAPAN

 SWEDEN

# Leaders at a Glance

The following chart details the Top 10 Country Brands' travel profiles for the past year<sup>1</sup>



FRANCE

6

POPULATION:  
64,057,792

GDP:  
\$2.1 trillion

SIZE:  
248,429 sq. miles

AIRPORTS:  
476

TRAVEL & TOURISM % OF  
GOVERNMENT EXPENDITURE:  
3.0%

TRAVEL & TOURISM GROWTH:  
1.9%

TRAVEL & TOURISM INDUSTRY  
% OF GDP:  
4.1%

EXPERTS SAY:

"France has a strong local identity (wine, music, fashion, language, tradition and culture) and the ability to load its brand with emotion: beauty, quality of life, romance."

NEW ZEALAND

7

POPULATION:  
4,173,460

GDP:  
\$112.4 billion

SIZE:  
103,738 sq. miles

AIRPORTS:  
121

TRAVEL & TOURISM % OF  
GOVERNMENT EXPENDITURE:  
3.3%

TRAVEL & TOURISM GROWTH:  
3.3%

TRAVEL & TOURISM INDUSTRY  
% OF GDP:  
6.0%

EXPERTS SAY:

"New Zealand delivers what it promises. Its destination branding has used strong emotional effects: quality, well-being, safe operation, cultural interaction and pristine and pure scenery."

UK

8

POPULATION:  
60,943,912

GDP:  
\$2.1 trillion

SIZE:  
94,526 sq. miles

AIRPORTS:  
449

TRAVEL & TOURISM % OF  
GOVERNMENT EXPENDITURE:  
2.7%

TRAVEL & TOURISM GROWTH:  
1.6%

TRAVEL & TOURISM INDUSTRY  
% OF GDP:  
3.4%

EXPERTS SAY:

"The UK is a well thought out and executed brand that effectively utilizes all of the natural and cultural resources of the country."

JAPAN

9

POPULATION:  
127,288,416

GDP:  
\$4.3 trillion

SIZE:  
145,883 sq. miles

AIRPORTS:  
176

TRAVEL & TOURISM % OF  
GOVERNMENT EXPENDITURE:  
4.1%

TRAVEL & TOURISM GROWTH:  
1.8%

TRAVEL & TOURISM INDUSTRY  
% OF GDP:  
3.4%

EXPERTS SAY:

"Japan already has a high brand profile, but we've found that traveler expectations are always exceeded by the country. The diversity, culture and quirkiness of Japan — and the lower yen — are a powerful combination."

SWEDEN

10

POPULATION:  
9,045,389

GDP:  
\$338.5 billion

SIZE:  
173,732 sq. miles

AIRPORTS:  
250

TRAVEL & TOURISM % OF  
GOVERNMENT EXPENDITURE:  
2.2%

TRAVEL & TOURISM GROWTH:  
3.6%

TRAVEL & TOURISM INDUSTRY  
% OF GDP:  
2.4%

EXPERTS SAY:

"Sweden has the charm of Europe but an intriguing sense of mystery and otherness about it. It offers the traveler a variety of adventures and is proving to be a strong destination."

# Why Country Brands Matter

Countries are becoming more aware of the importance of defining how they want to be perceived and the need to improve and leverage their assets. While tourism is often the most visible manifestation of a country brand, it is clear that the image, reputation and brand values of a country impact its products, population, investment opportunities and even its foreign aid and funding. Looking at a nation holistically, determining its key requirements and essential objectives, and aligning initiatives to both the public and private sector are the best ways to create a successful country brand.



# A Strong Country Brand Will...

COMMUNICATE WITH POWER AND ECONOMY

ATTRACT TALENT AND INVESTMENT

PROMOTE SOURCES OF ECONOMIC VALUE

ENABLE AND/OR ENDORSE CHANGE

BRAND EXPORTS PROFITABLY

REDRESS STEREOTYPES AND CLICHÉS

EXPRESS A UNIQUE CORE IDEA

BUILD GLOBAL COMPETITIVE ADVANTAGE

SERVE AS A SOURCE OF DIFFERENTIATION

LINK DISTINCT COUNTRY OFFERINGS



## News & Noteworthy

- In 2008, Travel & Tourism is forecast to account for US\$5.9 trillion of economic activity, equivalent to 9.9% of the global GDP and more than 238 million jobs, or 8.4% of total employment.<sup>2</sup>
- Since 2004, the annual increase in the GDP of the global Travel & Tourism economy has averaged 4% in real terms — greater than that of the global economy overall. During the same period, Travel & Tourism has created more than 34 million jobs.<sup>3</sup>
- In 2007, international tourist arrivals grew by an estimated 6% to reach a new record figure of nearly 900 million (a 12.5% increase from 2005).<sup>4</sup>
- Although growth is expected to slow in 2008, forecasts to date are still positive, pointing to a 3% GDP growth of the global Travel & Tourism economy and 6 million additional Travel & Tourism jobs worldwide.<sup>5</sup>

# 266 MILLION

**INTERNATIONAL TOURIST ARRIVALS FROM JANUARY THROUGH APRIL OF 2008. THIS FIGURE IS A 5% INCREASE COMPARED TO THE SAME PERIOD IN 2007.<sup>6</sup>**

# \$3.2 TRILLION

**ESTIMATED EXPENDITURES FOR TOTAL WORLD PERSONAL TRAVEL AND TOURISM IN 2008, WITH BUSINESS TRAVEL AN ADDITIONAL \$843 BILLION.<sup>7</sup>**

# Emerging Trends

FutureBrand's country branding trends consistently predate what many mainstream publications and media subsequently report as growing travel practices. Our expertise in country branding allows us to constantly stay ahead of the curve and anticipate shifting patterns, global considerations and industry implications to help keep our clients focused on the future. Notable trends this year include niche and focused opportunities as well as the changing destination landscape.

## Luxury Flying Upgrades

### **MORE FLIGHT OPTIONS & CLASSES**

The luxury travel market is growing between 10% and 20% every year, two to three times the rate of overall world tourism, with the Mediterranean, the Middle East and the Far East the biggest beneficiaries.

To cater to this lucrative market, many airports and airline brands are now creating exclusive and upper-class-only terminals (Emiri Terminal in Qatar's New Doha International Airport and Lufthansa Terminal in Frankfurt are notable) as well as new and improved premium-class sections in airplanes.

Emirates Airlines has upped the ante on luxury travel by creating a "P" class, which means first class with private suite. Singapore Airlines also offers super-first-class seating service and business-class-only flights.

Additionally, there are a variety of new alternatives to conventional air travel that provide greater flexibility for the luxury traveler. Regional jets and air taxis are increasingly available. These small planes carry up to six people, can fly out of smaller airports and have the potential to serve passengers on a point-to-point as-needed basis without reservations.

### **IMPROVED AIRPORTS**

As gateways to the countries they represent, airports are increasing in size, capacity and stature to become more than just transit centers. With new and expanded facilities designed by "starchitects," airports are becoming monuments, functioning as economic catalysts and destinations in and of themselves.

Technology is playing a larger role in the airport experience from radio frequency identification (RFID), smart ID cards and self-check-in, aimed at reducing the number of staff hours required to handle passengers, to an increasing range of technology-enhanced security and surveillance devices.

At the same time, the check-in process is continuing to move outside the airport. Airlines like Air Canada are utilizing bar-code technology to allow passengers to board solely with their cell phones (without a printed e-ticket), via text messages received the day of the flight. This has already been adopted in Japan and Spain.

# Emerging Trends

## The Growth of Specialized Travel

### RISE OF WOMEN

Women are traveling more frequently without men, and women-only tours and retreats are becoming increasingly popular. The number of women-only travel companies has jumped 230% in the last six years, while women-only travel sites have proliferated. Over half of all adventure travelers worldwide are women, and their average age is 45.<sup>8</sup>

### GRANDCHILD ON BOARD

Affluent retirees in the US, Canada and Japan are traveling more, and this trend by itself is likely to continue increasing. At the same time, up to half of vacationing baby boomers now travel with their grandchildren, indicating a new segment of multigenerational travel.

### SPONTANEOUS TRAVEL

High-pressure lifestyles and developments in online travel have resulted in consumers taking more short trips each year, often booked with little advance notice. In fact, specific online sites have sprouted up catering to this growing “last-minute, few-days” traveler.

### RELIGIOUS TOURISM

Religious site visits and pilgrimages have long attracted devotees and believers, but now this concept is growing in popularity. The Vatican launched the world’s first airline for Catholic pilgrims. Additionally, specialized tours cater to orthodox believers from a variety of faiths, ensuring that activities and even travel vehicles meet sometimes-stringent religious standards.<sup>9</sup>

### FINITE TRAVEL

There is a rise in people visiting attractions — places and/or species — that are seen as endangered or at some form of time-related environmental risk. From polar bear and harp seal excursions to rain forest and glacier vacations, many travelers are prioritizing these types of trips so they can experience the attraction in their lifetimes, before it is lost or irrevocably altered.



## Changing Landscape

### PRIME DESTINATIONS SHIFTING

There has been a considerable global shift in tourism growth. The growth rates of traditional tourism giants are being eclipsed by some rising stars. In terms of regional performance, Africa, Asia Pacific and the Middle East are experiencing higher growth rates than the world average, in terms of total Travel & Tourism demand, at 5.9%, 5.7% and 5.2%, respectively, while the mature markets — most notably the Americas and Europe — are falling below the world average, with growth of 2.1% and 2.3%, respectively.<sup>10</sup>

### CITIZENS RISING

Citizens are now becoming more vocal about the brands their countries present. Much has been made about Botswana's recent country branding efforts, focusing on opportunity and tranquility, which citizens feel does not capture the country's essence or create excitement. Italy's design community also rejected a new Italy country logo, which was subsequently dropped by the government.

### SEEKING POVERTY VACATIONS

In their quest for an authentic experience, travelers have recently been seeking out destinations such as Soweto, South Africa; Mumbai, India; and Rio de Janeiro, Brazil for experiences that expose them to poverty-stricken communities or polluted areas. "Poorists" find experiences that not only appeal to their empathy for the disadvantaged, but give them exposure to a reality that is not available in upscale trips to exotic destinations.<sup>11</sup>



## 2008 Experts

**SOLEDAD AGUADO**

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Executive Vice President —  
Marketing & Sales,  
Lufthansa Airlines  
Germany

**ROBERT BAILEY**

President & CEO,  
Abacus International  
Singapore

**DIANA BRANISSO**

Product Manager,  
Blumar Turismo  
Brazil

**THOMAS L. DOORLEY III**

CEO,  
Sage Partners  
United States

**WENDY GOLD**

Principal,  
OpenCity Projects  
Canada

**DR. ROBERT GOVERS**

Assistant Professor &  
Independent Consultant,  
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**ARNIE WEISSMANN**

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Travel Weekly  
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**STEVE WHEELER**

Senior Vice President —  
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**SAM YAO**

Senior Reporter & Writer,  
Commercial Times  
(China Times Group)  
Taiwan



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#### EXPERT PHOTOS:

1. Anna Klingmann 2. Arnie Weissmann 3. Bill Walshe 4. Darrell Wade  
 5. David Spencer 6. Freddy Neira Guzmán 7. Gonzalo Zegarra Mulanovich  
 8. Jelena Maksimović 9. João Annibale 10. Dr. Johannes von Thadden  
 11. John Kent 12. Julie Grégoire 13. Laurent Tareau 14. Nick Perry  
 15. Nitin Motwani 16. Philippe Mettey 17. Dr. Robert Govers  
 18. Soledad Aguado 19. Steve Wheeler 20. Thierry Antinori  
 21. Thomas L. Doorley III 22. Wendy Gold

# Views from the Experts

## A TURBULENT LANDSCAPE

Although recent events may have eclipsed the views below, several experts note the current economic climate and rising cost of fuel as key considerations.

“The global tourism industry will be heavily affected by the exploding costs of energy. Low-cost tourism will be more severely hit than high-budget traveling. Regional tourism will profit as a result.”

“Prospects for international tourism remain positive, although the overall economic climate has deteriorated, reducing consumer confidence and putting pressure on household spending and thus on travel budgets.”

“Despite high oil prices, people want to travel and will continue to do so.”

“The recent fuel price increases will dampen the mood for traveling, with the most noticeable impact on international tourist numbers from North America and Europe — the regions worst hit by the credit crunch. However, in-region demand in Asia looks to remain strong. In the short term, expect to see more short-haul rather than long-haul travel, especially for the leisure sector.”

## NEW FACES

Experts report the trend of travel growth from emerging markets and expect a notable shift in the global tourism industry as a result.

“Increasing competition from tourists stemming from newly-rich countries (East Asia, the Gulf region) will lead to a shift in the global tourist industry away from the needs and wants of ‘Westerners’ to the needs and wants of new tourists with different tastes and desires.”

“New markets — outgoing Chinese, Indian and Eastern European customers — will counteract the possible stagnation of travel from mature markets.”

“There will be an influx of tourists from new global players (e.g., China, Russia, India).”

“With growing middle-class incomes in Russia and China, tourists from these countries will choose countries in proximity (Australia) and aspirational destinations (Croatia, Italy, Greece) for vacations.”

“With their improved incomes and global exposure, Asians and Latin Americans are increasingly interested in traveling.”



ACCORDING TO THE EXPERTS

**COUNTRIES THAT MARKET THEMSELVES THE BEST:**

1. AUSTRALIA

2. UNITED ARAB EMIRATES

3. NEW ZEALAND

## NO MIDDLE GROUND

An increasing polarization of the Travel & Tourism industry, resulting in an expansion of low- and high-end markets and a noticeable loss of the middle market, is noted.

“Due to the global economic recession, travel/hospitality products tend to be polarized. The intermediate zone is missing. Now the average, non-affluent traveler can only go for the lower-cost options, while paying the price of lower quality.”

“The gap is widening: either travelers choose luxury hotels or, conversely, low-cost/budget accommodations. Globally, middle-scale hotels seem shunned.”

“We are seeing a loss of the ‘middle’ with the increased polarization of the industry.”

“It seems that the ‘low-cost’ approach to pricing has been adopted by the shrinking mid-level market as a new revenue-generating approach.”

## RETURN TO ROOTS

Experts see a continuing industry trend of travelers who increasingly seek authentic and intimate offerings.

“Small hotels that are more family-oriented with a unique local identity, like B&Bs, are growing in number as well as in preference.”

“‘Back to basics’ is the new luxury, with self-sufficient, sustainable and premium resorts that focus on regional qualities and solitude.”

“We are seeing a return to authenticity after an early-to-mid-90s focus on extravagance.”

“People are favoring charming destinations and hospitality rather than large, impersonal international hotels.”

“There’s an increasing interest in getting involved with local communities.”



ACCORDING TO THE EXPERTS

**COUNTRIES THAT DO NOT PROMOTE THEMSELVES AS WELL AS THEY COULD:**

1. UNITED STATES    2. BRAZIL    3. CHINA

# Views from the Experts

## CUSTOMIZABILITY CREATES MEMORABILITY

Experts note the increasing demand for customizable and special interest packages that offer travelers a more personalized and differentiated experience.

“Travelers are increasingly looking to customize vacation packages according to their needs and wants, instead of just taking the classic city tour.”

“The number of people looking for special, personalized travel opportunities is increasing, requiring further-developed hospitality.”

“There is an increase in the number of people traveling for a specific purpose (e.g., volunteer groups and sporting events). Travel agents, hotel management and other industry professionals are now showing greater willingness to cater to the specific needs of these groups.”

“In an increasingly customized market, with identity-driven consumption, niches will continue to emerge. This means that there are plenty of target markets — defined in terms of identities, hobbies, sports, ethnicities, etc. — that require personalized travel services.”

## ECO-FRIENDLY SUSTAINS

Environmental awareness and sustainability continue to be prevalent in traveler considerations, with increasing support initiatives from the industry.

“There is a growing focus on being ‘green’ and assuming responsibility for the environment. Many airlines are now looking at ways to reduce their carbon emissions, and some have even introduced a voluntary ‘green fee’ for environmentally-conscious travelers. The hospitality industry is also becoming more environmentally aware with the use of eco-friendly electric appliances, encouraging the reuse of linens, etc.”

“There is an increasing focus on sustainability issues in the Travel & Tourism industry today, and not just at policy levels.”

“The trend toward ‘green’ programs and operations continues to pick up momentum.”

“People are more aware of the environment, global warming and the effects of carbon dioxide emissions. As a result, people tend to travel, hire and use products from environmentally-friendly companies.”



ACCORDING TO THE EXPERTS

### UNDERRATED COUNTRIES ON THE RISE:

1. BRAZIL
2. CROATIA
3. VIETNAM

## EXPERIENCES ENDURE

Experts emphasize the rise of experiential tourism — people are expecting more from their travels and are seeking enriching sensory experiences.

“Experience has become the most important driver in tourism. Action has taken control, and now it’s important not just to look but also to taste, touch and experience. Activities like diving over a reef, collecting grapes for wine or homestays with natives to learn about their culture are becoming more and more popular. People seek authentic cultural experiences without any kind of intermediary.”

“More than ever, travelers are seeking an experience instead of just a visit. It’s now more about living the place than just seeing it.”

“The high-end hotels that offer ‘experiences’ rather than just another comfortable bed are doing well. People are willing to pay a premium for unique experiences.”

“Travelers are increasingly seeking vacation experiences they will remember.”

## COUNTRY BRANDING 101

The category’s growing maturity and need to be comprehensive and dynamic is becoming more evident.

“Country branding increasingly has to combine different aspects and tools that together create a strong brand: tourist attractions, infrastructure, price, quality, safety, beauty, tourism promotion along with business and education promotion, etc. Thus, tourism becomes part of the overall country branding.”

“Globally, countries that find themselves in the top positions as destinations are generally sleeping leaders. Rather than proposing high prices, they should consider adding new dynamics to their offerings to challenge the increasing number of competitors.”

“To project a strong country brand, there needs to be a comprehensive plan, themes and areas of interest. The proper vehicles to broadcast brand messages must be carefully chosen. Governments may have a great product on hand, but sorting out the proper channels and messages is the key to success.”



ACCORDING TO THE EXPERTS

**OVERRATED AND DECLINING COUNTRIES:**

1. UNITED STATES

2. FRANCE

3. EGYPT

# Country Brand Framework: Dimensioning Country Brand Strengths

FutureBrand's Country Brand Framework includes eight essential country brand dimensions. Developed specifically for country brands, the framework crystallizes how we look at these highly complex and multilayered brands. It allows us to discern the strengths of countries and identify leverageable assets for the development of holistic country brand platforms.

The eight key dimensions of a country brand are composites of multiple attributes and are divided into needs- and wants-based components. Of the eight, some may necessitate long-term investment and the involvement of all avenues of government to be sources of success. Others may be strong brand assets already, while a few may be areas of opportunity. This differs for each country brand.

## OBSERVATIONS

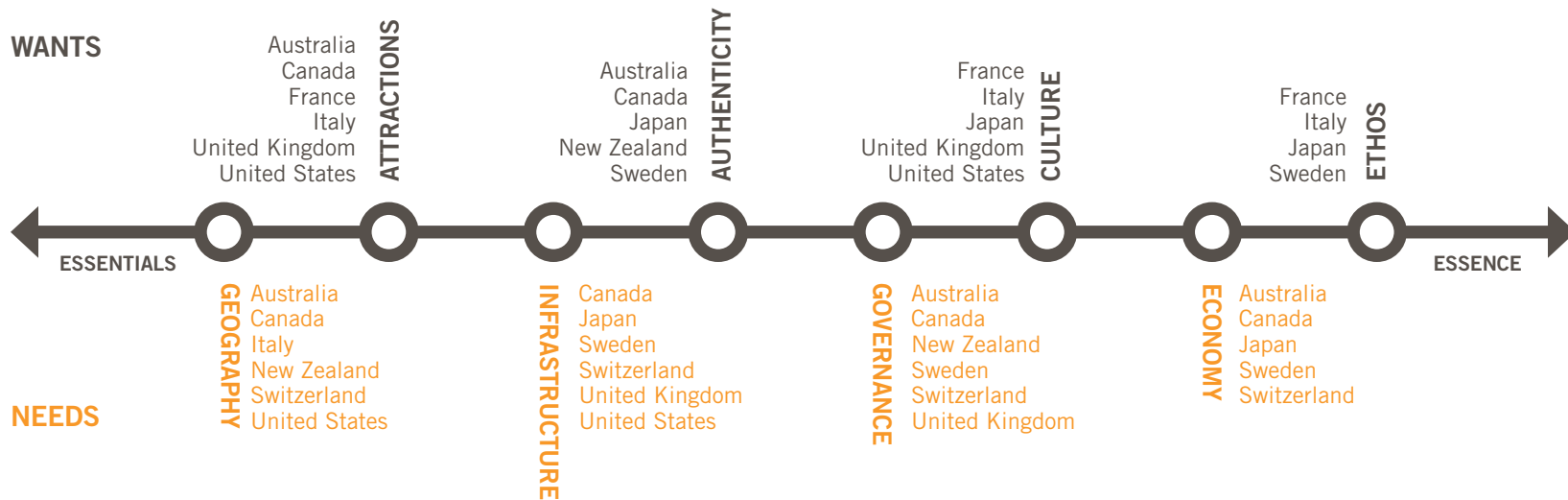
This year, no single country brand is represented in all eight dimensions of the Country Brand Framework. However, the top two country brands, Australia and Canada, rank in five and six out of the eight categories, respectively. The United States, the #3 ranked brand, places in four framework dimensions: attractions, culture, geography and infrastructure. The US notably dropped from governance and economy due to its unpopular foreign policy, the war in Iraq and the credit crisis.

Italy continues to place well in the wants-based associations of attractions, culture and ethos, as well as in geography, helping to deliver a strong country experience. Switzerland and Sweden have each successfully leveraged infrastructure, governance and economic indicators to create country brands that are positively received. The United Kingdom and Japan are able to provide strengths across both wants- and needs-based measures to evidence powerful country brands that combine both tangible and intangible assets. New Zealand's authenticity, geography and governance strengths continue to create a compelling combination of benefits.

While none of the Top 10 country brands is strong across all eight dimensions of the Country Brand Framework, not one is weak in the areas of attractions, infrastructure and economy. Among the few true weaknesses evidenced are that New Zealand and Australia rank 31st and 35th, respectively, in art & culture; Japan is a country well known for its lack of resources (and resulting ingenuity); and the US ranks 19th in political freedom, a harsh blow for the first constitutional democracy and historic champion of civil liberties.

## 2008 TOP 10 COUNTRY BRANDS: THE STRONGEST PERFORMERS BY DIMENSION

The brands highlighted are those whose assets in each dimension both lead the industry and drive country brand performance



### WANTS ORIENTED

- ATTRactions: Diversity and quality of unique places, range of things to see and do
- AUTHENTICITY: Unique character along with the rich texture of local life; rituals, programming, events
- CULTURE: Arts, crafts, intellectual pursuits, creative environment
- ETHOS: Customs, beliefs, mores and history that create a distinctive mystique

### NEEDS ORIENTED

- GEOGRAPHY: Natural resources, topography, landforms
- INFRASTRUCTURE: Technology, communications, transportation, health care
- GOVERNANCE: Degree of effectiveness in the way a country is ruled, as evidenced by political freedom, safety, security
- ECONOMY: Ability to produce and distribute wealth; standard of living

# Live vs. Visit Considerations

This year, FutureBrand identified and prioritized attributes that drive the desire to visit a country or the desire to live in a country other than one's own. Interestingly, the results show that visitors are more focused on a country's essence (attractions, authenticity, culture, ethos), while the selection of a country to live in rests more heavily on its essentials (geography, infrastructure, governance, economy) and its solidity and steadiness as a nation. As a tourist, a country's physical beauty, uniqueness, ability to provide relaxation, welcoming people and safety are all key. For those who are seeking to move to another country, the selection of where appears largely based on opportunity for better work, the wish to do business there and the destination's environmental orientation, economic standard of living, safety and degree of political freedom.



# DESIRE TO VISIT A COUNTRY

1. NATURAL BEAUTY

2. AUTHENTICITY

3. REST & RELAXATION

4. FRIENDLY LOCALS

5. SAFETY

6. IDEAL FOR BUSINESS

7. STANDARD OF LIVING

8. ART & CULTURE

9. EASE OF TRAVEL

10. FINE DINING

1. IDEAL FOR BUSINESS

2. ENVIRONMENTALISM

3. STANDARD OF LIVING

4. SAFETY

5. POLITICAL FREEDOM

6. FINE DINING

7. FRIENDLY LOCALS

8. EASE OF TRAVEL

9. RESORT & LODGING OPTIONS

10. NATURAL BEAUTY

# DESIRE TO LIVE IN A COUNTRY

# HDM: A Structured View of the Customer Mindset

The Hierarchical Decision Model (HDM) is a proprietary FutureBrand methodology used to assess the development of a brand in terms of the place it occupies in the mindset of customers. Based on how people process information and form relationships with brands, HDM facilitates more targeted brand management to promote preference, purchase and loyalty. HDM makes it clear that achieving strength across each measure, from awareness to advocacy, is what it takes to become a Top 5 country brand.

**AUSTRALIA:** Australia's strength as the #1 country brand for the third consecutive year is driven by a depth of brand associations that is enviable: Top 10 rankings for 17 image attributes. Two areas where Australia has room to improve are familiarity and advocacy. Canada's familiarity is 45% higher than Australia's, and Australia's advocacy level is significantly lower than what the US, Canada, Italy and a number of other country brands achieve.

**CANADA:** Canada's rise to the #2 position can be attributed to comparatively strong familiarity, associations, visitation and advocacy. This is an effectively packaged country brand whose one glaring weakness is in preference.

**UNITED STATES:** Perhaps the most enigmatic country brand, the US dropped to the #3 position overall while remaining the most fully-developed

nation. Most of the decline experienced by the US can be attributed to weakening brand associations, most likely derived from rising antipathy toward the country's foreign policy rather than a growing belief, for example, that the US is no longer a viable source of fine dining options.

**ITALY:** Italy's country brand is driven by strong, focused assets that create an enticing brand image: #1 in art & culture and in the Top 10 for history, fine dining, shopping, friendly locals and family offerings.

**SWITZERLAND:** Switzerland, a new entry in the Top 10, shows strength across most measures, with notable exceptions in preference and advocacy, both of which are areas for potential improvement.

## COMPONENTS OF HDM

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**AWARENESS:** Do key audiences know that the country exists? How top of mind is it?

---

**FAMILIARITY:** How well do people know the country and what it offers?

---

**ASSOCIATIONS:** What qualities come to mind when people think of the country?

---

**PREFERENCE:** How highly do audiences esteem the brand? Does it resonate?

---

**CONSIDERATION:** Is this one of the countries being thought about for a visit?

---

**DECISION / VISITATION:** To what extent do people follow through and visit the country?

---

**ADVOCACY:** Do people recommend the country to family, friends and colleagues?

### WHAT MAKES THE WINNERS WINNERS?

TOP 5	1 AUSTRALIA	2 CANADA	3 USA	4 ITALY	5 SWITZERLAND
AWARENESS	81.6%	▶ 85.4%	▶ 87.3%	▶ 86.5%	78.6%
FAMILIARITY	24.0%	34.8%	▶ 43.7%	34.2%	24.8%
ASSOCIATIONS <small>Orange = #1 ranking White = Top 5 ranking</small>	<ul style="list-style-type: none"> <li>Families</li> <li>Resort &amp; Lodging Options</li> <li>Natural Beauty</li> <li>Outdoor Activities &amp; Sports</li> <li>Friendly Locals</li> <li>Standard of Living</li> <li>Extend a Business Trip</li> <li>Most Impressive Last Year</li> <li>Most Like to Live In</li> <li>Desire to Visit / Visit Again</li> <li>Beach</li> </ul>	<ul style="list-style-type: none"> <li>Families</li> <li>Outdoor Activities &amp; Sports</li> <li>Friendly Locals</li> <li>New Country for Business</li> <li>Easiest to Do Business In</li> <li>Conferences</li> <li>Ease of Travel</li> <li>Most Like to Live In</li> </ul>	<ul style="list-style-type: none"> <li>Shopping</li> <li>Nightlife</li> <li>Resort &amp; Lodging Options</li> <li>Easiest to Do Business In</li> <li>Desire to Visit / Visit Again</li> <li>Ideal for Business</li> <li>Conferences</li> <li>Advanced Technology</li> <li>Quality Products</li> </ul>	<ul style="list-style-type: none"> <li>Art &amp; Culture</li> <li>History</li> <li>Fine Dining</li> <li>Quality Products</li> <li>Desire to Visit / Visit Again</li> </ul>	<ul style="list-style-type: none"> <li>Environmentalism</li> <li>Resort &amp; Lodging Options</li> <li>Natural Beauty</li> <li>Fine Dining</li> <li>Outdoor Activities &amp; Sports</li> <li>Safety</li> <li>Ease of Travel</li> <li>Standard of Living</li> <li>Most Like to Live In</li> </ul>
PREFERENCE	▶ 18.6%	6.8%	15.7%	9.3%	3.3%
CONSIDERATION	29.9%	26.3%	▶ 40.0%	33.7%	17.5%
DECISION / VISITATION	23.7%	35.8%	▶ 52.7%	47.7%	35.0%
ADVOCACY	6.7%	10.9%	▶ 14.1%	9.9%	6.0%

▶ Designates significant difference at the 95%+ confidence level compared to the other country brands

# Countries in Momentum

No country brand ever stands completely still — it is always in momentum, either improving or declining, whether in large measures or in small, subtle ways.

A country typically enters the Emerging phase when it clarifies its unique essence and begins to communicate that essence to attract attention and resonate with audiences.

A country In Vogue connects with a group of people “in the know” to become the new “it” destination, generating word-of-mouth advocacy and establishing itself as the new place to be. Unfortunately, this status rarely lasts for long (a few years at most). Early adopters are notoriously fickle and will abandon a destination quickly once word has gotten out to the wider marketplace.

At this particular phase, a country brand is Rising: experiencing growth in awareness, a solidifying brand image, plus increasing traveler preference and loyalty.

At some point, dependent on the breadth and depth of its country brand assets along with the quality and consistency of the brand experience it provides over time, a country brand reaches maturity and works toward Maintaining. Some countries stay in this phase for extended periods of time.

However, natural disasters, a failing economy, war, unpopular foreign policy, terrorism, contaminated export products, etc. can move a country into decline.

A strong brand can help a country rebound from Declining status. The way out of this phase is to reconnect with audiences by staying true to the brand’s core essence, or, if necessary, by recasting itself in a new light.



# Branding for Today and Tomorrow

Country branding often requires a balance of long-term, future-focused vision and the need to prove value through the delivery of measurable results in the short term, especially in political environments. At the same time, countries must make a choice between branding for today — leveraging current, credible assets — and branding for tomorrow, when the country expects the effects of transition or transformation programs to be visible.

**BRANDING TODAY**

Whether well developed or not, some nations focus their country brand strategy on what they believe is presently an asset and a credible claim to make. These countries feature messaging with calls to action grounded in the present, implying that visitors must experience the country as soon as possible.

⊕ TANGIBLE / BELIEVABLE      ⊖ FORWARD LOOKING



**BRAND MESSAGING**

“Come and Find Your Own Wonder”  
**THAILAND**

“Keep Exploring”  
**CANADA**

“Celebrating 100 Years of National Awakening”  
**INDONESIA**

**BRANDING TOMORROW**

Many emerging nations, which have implemented significant revitalization campaigns, focus attention on the future of their countries. Brand strategies are built around the potential and future prospects of the country as well as an emphasis on becoming the next big player.

⊕ MOMENTUM / ANTICIPATION      ⊖ IMMEDIATE BENEFIT



**BRAND MESSAGING**

“Positively Transforming”  
**ESTONIA**

“We Are Next”  
**TRINIDAD & TOBAGO**

“A Land of Opportunities”  
**TANZANIA**

# Office of Brand

A growing trend, indicating the importance of nation branding, is the creation of Office of Brand, Brand Councils or other organizations that help govern and regulate established country brands. These groups often act as custodians of the brand, serve to drive investment and integrate marketing efforts. They also demonstrate the need for country branding to be an ongoing effort and not a limited-scope program that stops once a branding exercise is complete.

## SOUTH AFRICA

The International Marketing Council is a public-private organization that was established in 2000 to coordinate various marketing initiatives in order to create a consistent, positive and compelling brand image for South Africa. Its mission is to establish Brand South Africa, create an integrated approach within government and private sectors toward the international marketing of South Africa and build national support for the brand within the country.

[WWW.BRANDSOUTHAFRICA.COM](http://WWW.BRANDSOUTHAFRICA.COM)



Photos courtesy of Chris Kirchoff, [www.mediaclubsouthafrica.com](http://www.mediaclubsouthafrica.com)

## INDIA

India Brand Equity Foundation (IBEF) is a public-private partnership among the Ministry of Commerce and Industry, the Government of India and the Confederation of Indian Industry. The Foundation's primary objective is to build positive economic perceptions of India globally. It aims to effectively present the Indian business perspective and leverage business partnerships in a globalizing marketplace.



## ABU DHABI

The Office of the Brand was created in 2007 to act as guardian of Brand Abu Dhabi. This office will assist public and private sectors in understanding the brand and its purpose, while providing guidance on its application in all activities that may have an impact on the reputation of the Emirate of Abu Dhabi.



# Delivering a Country Brand

For the traveler, every in-country experience adds to or detracts from the overall impression of the destination. From the airport conditions, the simplicity of customs procedures and the cost of a cab to the ease of conducting business, the friendliness of the locals and the quality of the hotel service, a perception is being created about what the country is (or isn't) about.

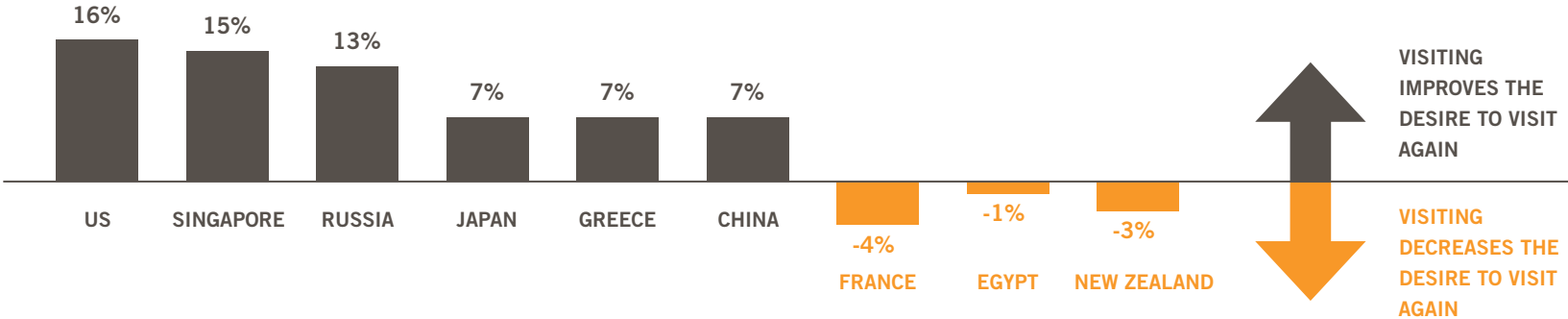
As part of the 2008 Country Brand Index research, respondents were divided into those who visited specific countries and those who were familiar with the countries but had never visited them. Significant differences in the country perceptions of the two groups indicate how well the country brand experience delivers against expectations.

The impact of visitation on country perceptions was examined in two ways: how it affects the desire to visit and how it influences the overall rating of the country brand — the figure upon which the Top Country Brand ranking is based. Countries with positive differentials on the first measure are places where visiting makes people more likely to want to visit again. The in-country experience was positive. Where there is a negative differential, the experience was less than positive and people are less likely to want to visit again. The same pattern holds true for the overall rating of the country brand with regard to the country's perceived reputation.

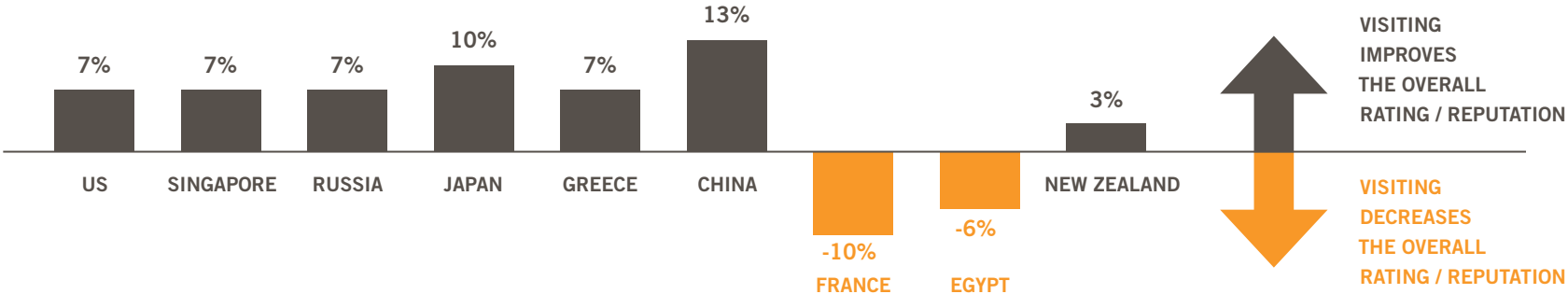
Based on the sampling of countries included in this analysis, these are the six country brands whose experience most significantly increases their brands' strength. We also present three notable brands that underdeliver compared to expectations.



**DIFFERENTIAL\* IN DESIRE TO VISIT / VISIT AGAIN**



**DIFFERENTIAL\* IN OVERALL RATING OF THE COUNTRY BRAND**



\*Differential represents the rating difference between visitors and familiar non-visitors

# Country-Branded Products: Extending the Country Brand into the Realm of Commerce

A strong country brand doesn't just attract tourists and investment; it can also support the sale of products. Country-branded products greatly leverage pre-existing perceptions of the country to increase awareness, create an image and influence opinions of the quality of the product. Some countries are known for specific products while some products are associated with specific countries. Other countries have the ability to positively influence a range of goods produced in-country by publicizing their origin. This is another example of how country branding can affect and interplay with a nation's other key assets. Ultimately, the stronger a country brand, the more advantaged its products are in terms of increased preference, price and loyalty.

## GENERAL COUNTRY BRAND ENDORSEMENT

Country brand endorsement tags can appear on a variety of products as a testament to their quality. When attaching a tag such as the ones featured below, the country brand must be confident in the product's caliber and certain that the connection will not diminish the value of the country brand.

### AUSTRALIAN MADE

"Grown in your own backyard"



### MADE IN USA

"Proudly made in the USA"



### TRUE ITALY

"This is a truly Italian Product!"



### COUNTRY TRADEMARKS

Geographical Indications (GIs) are intellectual property rights granted to certain countries. GI-protected products signify that only one country has the trademark to produce that good. The majority of GI-protected products are alcoholic beverages although there are examples in other product categories.

#### SCOTCH WHISKEY

Any whiskey labeled as “Scotch” must be produced in Scotland



#### COLOMBIAN COFFEE

Only coffees grown in Colombia may bear the “Café de Colombia” label



#### PORT

A fortified wine labeled “Port” must have been produced in Portugal



### SPECIFIC / FOCUSED COUNTRY BRANDS

These brands use official logos to formally market merchandise made by a variety of in-country producers. Other countries may make and export goods in the same category, but focused country brands allow companies to leverage their country's reputation for excellence in that particular industry.



#### EGYPTIAN COTTON



#### CUBAN CIGARS

#### Afghan Rugs

#### AFGHAN RUGS

### COUNTRY-LEVERAGED PRODUCTS

While not under specific legal restrictions, country-leveraged products utilize their country's name to capitalize on being the best-known producer of a product. This classification is not necessarily a brand in and of itself, but it does leverage the strength of the country image to increase the perceived quality of the product and inspire consumer confidence.



#### BELGIAN CHOCOLATES



#### FRENCH PERFUMES



#### SWISS WATCHES

# Airport as Brand Builder

Airports today are engines of economic development and are becoming new public attractions. They are now more than transit centers; they are valuable real estate, economic catalysts and destinations in themselves. Often designed by “starchitects” to create monuments for countries, airports are still rarely seen as country brand enablers, despite being gateways to their countries and, often, the first physical manifestation of the country experience.



While some airports may carefully determine their design, features and amenities, the role and relationship between the airport and country brand is almost never as clearly considered. A notable exception is the recent branding of the Abu Dhabi International Airport, which takes its mark from the Abu Dhabi destination brand.

More typically, airports create their own brands. These generally are associated with providing unique travel experiences, promoting themselves as destinations or being seen as world-class international hubs. Singapore's Changi Airport exemplifies this notion with a brand distinct from the national tourism mark. Globally recognized as one of the world's premier airports, offering both luxury conveniences and efficient operations, Changi prides itself on being a journey, a destination, a sensory experience — an airport to be enjoyed.

Airport brands don't necessarily need to link their logos to their countries' to be seen as enablers of the country brand. We've noted the considerable enhancements that airports and airlines are undertaking (see Emerging

Trends, "Improved Airports"); however, a compelling branded environment supporting and enhancing the host country continues to be a lost opportunity. Cultural performances, iconic imagery, displays and country kiosks can easily be added, as can trained personnel who welcome visitors with sincerity and pride.

As we noted last year when discussing the future of country-branded environments, the departure experience may be even more pivotal than the arrival. An impressive send-off can solidify a positive country experience and can even improve impressions of a trip that was less than ideal. Departing visitors are also prime prospects for opinion polls and satisfaction surveys, which can be handed out at the airport.

A small thank-you gesture or token gift can charm even the most hardened traveler, and certainly watching a local cooking demonstration, performance or immersive display would improve the mood of anyone waiting for his or her flight home. These impressions benefit not only the airport, but the host country. In today's competitive environment, it will be forward-thinking countries that take advantage of these innovative opportunities.



# Relying on a Regional Brand

Increasingly, country brands seem to be leveraging their regions in order to position themselves in the global marketplace. To gain awareness on the world stage or to set themselves apart from other comparable countries in the region, several country brands across Asia, Europe, Africa, the Caribbean and the South Pacific are choosing to integrate a regional message into their taglines and core marketing materials.



THREE APPROACHES TO LEVERAGING A REGIONAL BRAND:

1 MOST AUTHENTIC DESTINATION



First, country brands that position themselves as the most authentic destination within their region use the strength of regional context to make a statement about who or what they are. Barbados claims “The authentic Caribbean is calling” and Croatia offers “The Mediterranean as it Once Was.” These are statements that speak to what many people search for in a destination — a truly authentic experience.

2 IDENTIFYING WITH THE REGION



A second approach is to utilize the strength of regional brands to increase the awareness of countries’ own locations and brand messages. Malaysia is “Truly Asia.” Honduras describes itself as “The Central America you know — the country you’ll love.” Taglines such as these are helping destinations gain equity in markets inundated with comparable countries.

3 SYMBOLS OF NEWNESS IN THE REGION



With the third approach, emerging country brands — such as Albania and Rwanda — have elevated themselves as symbols of newness in their regions. Their respective taglines, “A New Mediterranean Love” and “Discover a New African Dawn,” invite travelers to reconsider these destinations for new or alternative experiences.

# A New World of Unsafe Travel

The recent phenomenon of “adventure travel” or “dark tourism” refers to the propensity of travelers to choose destinations with a known danger or thrill factor. After the 9/11 terrorist attacks in New York, the city became the leading destination for Britons to visit. Similarly, in 2002 both Bali and Sri Lanka — post-bombings and post-tsunami, respectively — saw increases in tourism bookings after an initial drop. A combination of motivations, including reverence, voyeurism, a desire for something out of the ordinary and the thrill of coming face-to-face with death, seem to increase tourists’ desire to visit countries well known for their lack of safety and security.

Most dangerous places hold minimal appeal for the majority of tourists. A more interesting phenomenon is countries where the desire to visit is high and exceeds the perception of safety by a significant degree — by a factor of 3:1 or more. The 10 destinations on the right represent a shift in the collective travel ethos, as safety used to be an absolute prerequisite for the majority of travelers. Safety still ranks as one of the most important drivers of the desire to visit a country; however, for these 10 countries, other factors clearly outweigh safety. While in reality the risk of exploring these countries may be minimal, they are still perceived as being unsafe. What’s more, travel to these countries is growing at more than double the rate for destinations where the perception of safety exceeds the desire to visit by more than 20%.



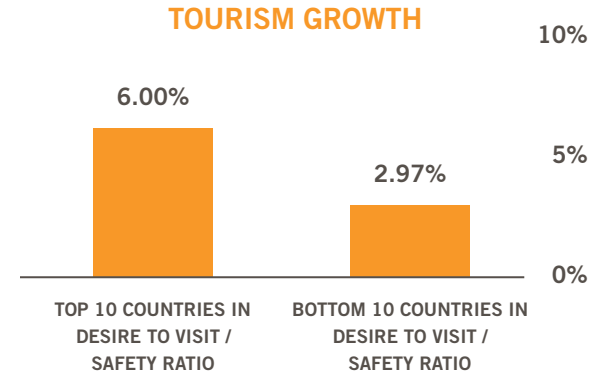
Desire to visit was at least three times higher than perception of safety — six times higher for Israel, the #1 country on this list



The Top 10 countries in desire to visit/safety ratio averaged more than double the tourism growth achieved by the countries that ranked in the Bottom 10 in this ratio — further testament to the appeal of these “unsafe” countries.<sup>12</sup>

**TOP 10 COUNTRIES IN DESIRE TO VISIT / SAFETY RATIO:**  
 Israel, Kenya, Russia, Egypt, South Africa, Brazil, China, Mexico, Cuba and Ecuador

**BOTTOM 10 COUNTRIES IN DESIRE TO VISIT / SAFETY RATIO:**  
 Belgium, Malta, Denmark, Finland, Austria, Netherlands, Norway, Switzerland, Sweden and Iceland



# Nature-Driven Brands

From Europe to the Pacific to Central America and the Caribbean, countries are increasingly centering their brands on their geographic features and the experiences those landscapes offer. This is no surprise, as the perception of natural beauty is the most important driver of destination choice (see “Live vs. Visit”). There is a wide spectrum, however, in how and to what degree these countries leverage their natural beauty.

Many brands are positioned around the concept of nature or of being natural with taglines like Belize’s “Mother Nature’s Best Kept Secret,” “Naturally Nepal” and Switzerland’s “Get Natural.”

Other brands emphasize purity, evoking the pristine and unsullied with taglines such as Costa Rica’s “No Artificial Ingredients,” Niue’s “Undiscovered, Unspoiled, Unbelievable” and New Zealand’s “100% Pure.”

A third group focuses on the striking beauty of their countries’ scenery, as in Turks & Caicos’ “Beautiful by Nature,” Martinique’s “Fleur des Caraïbes” (Flower of the Caribbean) and Montenegro’s “Wild Beauty.”

Surprisingly, eight of the countries ranked in the Top 10 for natural beauty do not overtly incorporate this idea in their branding. Australia, Canada, Chile, Ireland, Maldives, Norway, Scotland and Tahiti are all well-known for their beautiful scenery but do not focus on this brand asset in their

communications. Of the Top 10, only New Zealand (ranked #1) and Switzerland (ranked #3) explicitly focus on this theme. New Zealand highlights images of dramatic landscapes, employs messaging such as, “Best supporting country in a motion picture,” and ties it together with the tagline “100% Pure.” Switzerland uses “Get Natural” as its tagline and highlights outdoor activities by season on its website.

Whatever their rank, there is an opportunity for countries to better compete in this important category by connecting the abstract ideas of nature, purity and beauty to the concrete benefits they bring visitors. The attraction of nature could be the active amusements — such as ecotourism, outdoor sports and adventure experiences — that are made possible by the terrain. Purity is relevant to many pastimes, including wildlife observation and health and wellness pursuits, while beautiful scenery is ideal for sightseeing and photographic safaris. By coordinating brand positioning with related messaging and visuals, countries can promote their scenery in meaningful ways to better connect with travelers.



Natural

EXAMPLE:  
**NEPAL**

“NATURALLY NEPAL”



Pure

EXAMPLE:  
**NEW ZEALAND**

“100% PURE”



Beautiful

EXAMPLE:  
**MARTINIQUE**

“FLOWER OF THE CARIBBEAN”

# The Olympic Effect

The 2008 Country Brand Index was conducted during an Olympic year, when the world turned its attention to China and its preparations and staging of this most spectacular international event. The timing of the Olympics enables us to consider why the Olympics benefit country brands to such a great degree and what impact we might expect for Brand China in coming years.



"THE BIRD'S NEST" STADIUM WAS A CENTERPIECE OF ARCHITECTURAL MAGNIFICENCE FOR THE GAMES



Photo courtesy of Douglas M. Paine

One of the greatest opportunities that hosting an Olympics offers a country brand is permission to display the country's true colors and unique experiences. Unlike conventional tourism marketing, the Olympics is a chance to put aside the usual, oversimplified mass-marketing approaches and instead share a detailed, authentic and idiosyncratic experience of the host country. The richer images and messages of such an experience have great potential to affect the long-term associations people have with the country and to bring to life the essence of the local culture in ways that an advertising campaign never can.

The reason that these deeper messages and images are so valuable is that they are closely aligned with the most powerful drivers of tourism behavior — the desire for escape and discovery satisfied by authentic cultures and exotic experiences that offer a change from everyday life. These are exactly the kind of messages that are so difficult to deliver through marketing communications, but that can be delivered beautifully by the Olympic Games.

The benefits can be long-lasting. For example, it is no coincidence that Australia still rates strongly for friendly locals (#5 ranking in 2008). This image was cemented by the contribution of the volunteers in the Sydney 2000 Games, which was a strong part of the visitor experience and the media coverage.

# Brand China

For China, the 2008 Olympic Games arguably represented the single most important opportunity to address the “deficit of global respect,” a term coined by journalist Orville Schell<sup>13</sup> to describe the sense within China that the country’s international standing is not in line with its self-image.

We believe that China’s success in meeting key Olympic challenges — extraordinary pageantry, architecturally significant venues, the most luxurious accommodations for athletes at any Games and a clean city environment — will move Brand China forward and begin to address that deficit. The exquisitely orchestrated opening and closing ceremonies, delivered by renowned Chinese director Zhang Yimou, illustrated the complex layers of the China story — blending the ancient and traditional with the contemporary and high tech into an inspiring and historically-significant spectacle.

Also carefully considered was China’s investment in and focus on some of the more arcane and less competitive Olympic sports, a number of which China dominated, often for the first time in an Olympics. This strategy yielded the highest gold medal count, enabling China to declare itself the winner of the 2008 Olympics. “Winning the Olympics” was vital to China’s desire to boldly assert its leadership on the world stage. It was a message that reinforced the pride of its citizens while repositioning Brand China to the rest of the world. In the future, we expect the complete Olympic experience to propel Brand China to a higher ranking overall



and also in specific areas such as environmentalism, infrastructure and economic standard of living.

At the same time, however, the Olympic stage highlighted the tensions of Brand China, which were reflected in a series of juxtapositions that became a defining characteristic of the Games. Bloggers reported that there were “15 million smiling blue-and-white clad volunteers... a force of genuine friendliness and hospitality that is hard to deny,” but these reports ran alongside images of heavy policing and censored communications. Initially, strictly limited internal access to the web showcased the Chinese government as fearful of losing control; however, during and since the Games, internet accessibility was increased.

This contrast between internal and external perspectives on key issues reflects deeply-rooted cultural and philosophical differences between Western values and the Chinese worldview. As China continues to expand its influence globally as an economic superpower, we expect these differences to be a source of both friction and fascination, ultimately driving the evolving character of Brand China.

# Brand America

Brand America continues to be a powerful but polarizing country brand. In 2008, the United States dropped one spot to #3 in our Top Country Brand ranking. This year, significantly fewer people prefer the US and fewer visitors would recommend it as a destination to family, friends and colleagues.

THE US HAS SEEN A NOTEWORTHY DECLINE ACROSS MANY KEY DRIVERS OF THE CUSTOMER MINDSET				NOTABLY, THE US IS NOT IN THE TOP 10 IN THESE CRITICAL CATEGORIES	
2007 RANKINGS	2008 RANKINGS		CHANGE 2008 vs. 2007		2008 RANKINGS
#1	#2	EASIEST TO DO BUSINESS IN	▲ + 6.8%	FAMILIARITY	#14 STANDARD OF LIVING
#1	#6	EXTEND A BUSINESS TRIP	▼ - 4.5%	PREFERENCE	#19 POLITICAL FREEDOM
#1	#2	CONFERENCES	▲ + 3.1%	CONSIDERATION	#45 SAFETY
#2	#5	NIGHTLIFE	▲ + 9.8%	VISITATION	#62 ENVIRONMENTALISM
#4	#8	FAMILIES	▼ - 7.2%	ADVOCACY	
#5	#8	OUTDOOR ACTIVITIES & SPORTS			
#6	#7	MOST LIKE TO LIVE IN			

# Create Brand USA

Amazingly, the US is one of the only major countries in the world that does not have an official government tourism board. As a country brand, the US has no formal identity and no formal call to action to lure travelers and to help drive the economy. America as an entity has long reaped the rewards of state and city tourism campaigns, but no clear Brand America has ever been established within the tourism industry, or for any other purpose. With its performance in decline and its governmental leadership put to a vote this presidential year, shaping public opinion with the aid of a strong American image and brand are more important than ever, both at home and on the global stage.

FutureBrand created a Brand America student design contest to encourage debate and discussion on just what the US brand should mean. We asked students to create a brand to represent the entire country, with all its contradictions, complications and complexities.



**DON'T JUST VOTE  
CREATE BRAND  
USA**



**STUDENT  
DESIGN  
COMPETITION**

# Brand USA Student Contest

Design students all over the United States contributed their entries to the Brand America contest. Some classes made it a school project; some participated outside their curriculum. Submissions ranged from symbols of Americana — eagles, flags, stars and the Statue of Liberty — to more abstracted gestures of diversity, inclusion and opportunity. Even the choice of the country brand name varied and included USA, America, US and United States of America. Some designs were approachable and friendly; others, more commanding and emphatic. The most exciting part of the contest was understanding the brand values that rose to the top and served as inspiration to young people in America. These brandmarks show the range of what students had to offer.

## Select Submissions



## The Winner



### “USA”

Designed by: Yoo Hwa Almaraz-Hwang  
California

“The America I know is full of hope, courage, cultures and languages. I incorporated the 50 states as little blocks and chose warm colors because America is inviting to all. I wanted to show the harmonious elements in the word USA.”

1

## The Finalists

**AMERICA**  
THE WORLD IN ONE PLACE



### “THE WORLD IN ONE PLACE”

Designed by: John Keese  
Texas

“Many nations can focus on one unifying theme. America, however, is based on diversity. It’s uniquely all-inclusive. From shopping and physical beauty to business and endless possibilities, it possesses something no other nation can: the American dream.”

2



### “BE FREE, LIVE IN PEACE, PROSPER”

Designed by: Tatiana Trujeque  
California

“My inspiration came from two established symbols: the American flag, which suggests togetherness, and the bald eagle, our nation’s bird, which soars to great heights. To illustrate unity, I combined the flag into the heart of the eagle, suggesting a strong nation where we can be free, live in peace and prosper.”

3

# Italy and China: A Study of Contrasts

First connected by Marco Polo in the 13th century, today Italy and China represent polar opposites in their country branding approaches. While Chinese civilization and culture is much older, the modern-day China country brand is far younger and less developed than Italy's brand. What is most interesting about these two brands, however, is the contrast in the relationship between each country's internal and external branding.



## ITALY

### INTERNAL BRANDING

Italy is suffering from a well-documented malaise. While Italians are proud of their culture and la dolce vita is admired by many other countries, Italians express less satisfaction with life compared to citizens of other Western countries. Italians are also less optimistic and more unhappy about their national conditions.<sup>14</sup> A new tourism website has been in development for five years, and is still incomplete, due to political disputes and technological issues.<sup>15</sup> In addition, a country logo developed in 2006 was rejected by the Italian design community and subsequently dropped by the government.

### EXTERNAL BRANDING

The Italy country brand is beloved for art & culture, history, shopping and fine dining. Italy remains one of the best-known countries in the world, one of the Top 5 most desirable destinations and the #4 ranked Top Country Brand in 2008.

# CHINA

## INTERNAL BRANDING

The Olympics showcased the pride of the Chinese people in their history, progress and prospects for the future. Today's China is a country with a strong sense of destiny — a belief that the country is ascending to superpower status and will play an increasingly influential role in world affairs.

## EXTERNAL BRANDING

Even with the high-profile relaunch of Brand China as a result of the Olympics, the China country brand shows a low level of maturity in 2008. Only 29% of CBI global survey respondents rated China as excellent or very good overall. More important, while this research did precede the Olympics, China ranked 56 out of 78 in the Top Country Brand ranking. A side-by-side comparison to Brand Italy shows the comparative lack of maturity of the China country brand.



## HDM-BASED COMPARISON OF ITALY AND CHINA

Italy has significantly higher scores across every measure:

COMPONENTS	ITALY	CHINA
AWARENESS	▶ 86.5%	70.2%
FAMILIARITY	▶ 34.2%	15.4%
ASSOCIATIONS <small>Orange = #1 ranking White = Top 5 ranking</small>	Art & Culture History Fine Dining Quality Products Desire to Visit / Visit Again	Rising Star Most Impressive Last Year
PREFERENCE	▶ 9.3%	4.0%
CONSIDERATION	▶ 33.7%	12.7%
DECISION / VISITATION	▶ 47.7%	17.7%
ADVOCACY	▶ 9.9%	4.1%

▶ Designates significant difference at the 95% + confidence level compared to the other country brand

## AUTHENTICITY

Delivering distinctive, genuine and unique cultures and experiences



1. NEW ZEALAND

(1)



New Zealand appears dedicated to maintaining its true and unique essence — highlighting nature, culture and its people.

- 2. Japan ▲ (4)
- 3. Thailand ▲ (5)
- 4. India ▲ (8)
- 5. Egypt ▲ (6)
- 6. South Africa ▼ (3)
- 7. Peru ▲ (9)
- 8. Belize
- 9. Australia
- 10. China ▼ (2)

## HISTORY

Magnificent pasts celebrated by citizens and visitors alike



1. EGYPT

(1)



Egypt has one of the oldest and most intriguing histories in the world and remains a must-see destination for every generation.

- 2. Italy (2)
- 3. France ▲ (5)
- 4. Greece (4)
- 5. Israel ▲ (10)
- 6. United Kingdom (6)
- 7. China ▼ (3)
- 8. India (8)
- 9. Peru (9)
- 10. Japan

## ART & CULTURE

A thriving culture of fine arts, architecture, literature and performing arts



1. ITALY

(1)



Italy's famed architecture, art and music make it the strongest country brand in this category.

- 2. France (2)
- 3. Egypt (3)
- 4. Japan ▲ (9)
- 5. Greece ▲ (6)
- 6. United Kingdom ▼ (5)
- 7. Israel
- 8. India ▼ (4)
- 9. China ▼ (7)
- 10. Germany

## RESORT & LODGING OPTIONS

A superior variety of accommodation options



### 1. UNITED ARAB EMIRATES (1)

The UAE continues to establish itself as a strong brand for hospitality, promoting resorts for their unique architecture, premier service and ultimate luxury.

- 2. United States ▲ (6) 
- 3. Maldives ▼ (2) 
- 4. Australia ▼ (3) 
- 5. Switzerland 
- 6. Canada ▼ (5) 
- 7. Bahamas (7) 
- 8. Monaco 
- 9. Singapore ▼ (8) 
- 10. Tahiti ▼ (4) 

## EASE OF TRAVEL

The ability to easily enter, travel within and exit a country



### 1. NETHERLANDS

With one of the world's most efficient airports and extensive international and domestic transport networks, getting to, from and around the Netherlands is easy.

- 2. Spain 
- 3. Canada 
- 4. Switzerland 
- 5. Germany 
- 6. United Kingdom 
- 7. Denmark 
- 8. Sweden 
- 9. Italy 
- 10. France 

## SAFETY

Considered most stable and secure



### 1. NORWAY

Low crime rates, high health and safety standards, and a stable government make Norway the safest-rated country this year.

- 2. Switzerland ▲ (5) 
- 3. New Zealand ▼ (1) 
- 4. Sweden ▼ (3) 
- 5. Denmark ▼ (4) 
- 6. Canada ▼ (2) 
- 7. Monaco 
- 8. Belgium 
- 9. Austria ▼ (7) 
- 10. Australia ▼ (6) 

## REST & RELAXATION

The ideal array of tranquil and rejuvenating activities



1. MALDIVES

(1)



With its unique “one island, one resort” concept, Maldives offers a level of serenity and privacy you won’t find anywhere else.

- 2. Tahiti (2)
- 3. New Zealand ▲ (5)
- 4. Fiji ▲ (6)
- 5. Bahamas ▼ (3)
- 6. Bermuda ▲ (9)
- 7. Aruba (7)
- 8. Jamaica ▼ (4)
- 9. Switzerland
- 10. Ireland

## NATURAL BEAUTY

Striking topography and physical assets



1. NEW ZEALAND

(1)



High mountain country, remote beaches, endless green bushlands, lakes of rare beauty and sparkling clear rivers — New Zealand’s scenery is diverse and breathtaking.

- 2. Maldives ▲ (3)
- 3. Switzerland ▲ (6)
- 4. Norway
- 5. Australia ▼ (2)
- 6. Ireland ▲ (9)
- 7. Canada ▼ (4)
- 8. Scotland
- 9. Tahiti
- 10. Chile

## BEACH

Pristine beaches, from remote to mainstream



1. MALDIVES

(1)



Surrounded by the Indian Ocean with spectacular soft white sand and sparkling turquoise lagoons, the Maldivian beaches are rated as the most beautiful in the world.

- 2. Tahiti (2)
- 3. Bahamas (3)
- 4. Dominican Republic ▲ (5)
- 5. Australia ▼ (4)
- 6. Fiji ▲ (10)
- 7. Barbados
- 8. Mexico ▲ (9)
- 9. Bermuda ▼ (8)
- 10. Brazil

## NIGHTLIFE

Noteworthy bar, nightclub and late-night scene



### 1. JAPAN

▲ (10)

Nightlife in Japan is an eclectic mix of Western-style bars, clubs and discos and a more traditional late-night scene, part of Japanese society for centuries.

- |                   |       |  |
|-------------------|-------|--|
| 2. Brazil         | ▲ (3) |  |
| 3. Spain          | ▼ (1) |  |
| 4. Thailand       | (4)   |  |
| 5. United States  | ▼ (2) |  |
| 6. Australia      | (6)   |  |
| 7. Singapore      | ▼ (5) |  |
| 8. Netherlands    |       |  |
| 9. United Kingdom | ▼ (7) |  |
| 10. France        |       |  |

## SHOPPING

Accessible, diverse and abundant retail choices



### 1. UNITED STATES

(1)

Travelers from around the world continue to enjoy the extensive array of shopping offered in the United States.

- |                         |       |  |
|-------------------------|-------|--|
| 2. United Arab Emirates | (2)   |  |
| 3. Singapore            | (3)   |  |
| 4. Thailand             | ▲ (9) |  |
| 5. Japan                | (5)   |  |
| 6. France               | (6)   |  |
| 7. Italy                | ▼ (4) |  |
| 8. Monaco               |       |  |
| 9. United Kingdom       | ▼ (7) |  |
| 10. South Korea         | (10)  |  |

## FINE DINING

Superior culinary offerings and experiences



### 1. ITALY

▲ (2)

Italy's diverse regional ingredients, simple flavors and rich inventiveness create a culinary journey not to be missed.

- |                          |       |  |
|--------------------------|-------|--|
| 2. France                | ▼ (1) |  |
| 3. Japan                 | ▲ (4) |  |
| 4. Singapore             | ▼ (3) |  |
| 5. Switzerland           |       |  |
| 6. Austria               |       |  |
| 7. Spain                 | ▲ (9) |  |
| 8. Monaco                |       |  |
| 9. Belgium               |       |  |
| 10. United Arab Emirates | ▼ (7) |  |

## OUTDOOR ACTIVITIES & SPORTS

Best conditions, terrain and opportunities for land or water sports



### 1. AUSTRALIA

(1)



In Australia, you can climb the Sydney Harbour Bridge, explore the Australian wilderness, surf Bells Beach, ski Mount Kosciuszko, snorkel the Great Barrier Reef...and more.

- 2. New Zealand (2)
- 3. Canada (3)
- 4. Belize ▲ (9)
- 5. Switzerland
- 6. Maldives
- 7. Aruba
- 8. United States ▼ (5)
- 9. Austria ▲ (10)
- 10. Scotland

## FRIENDLY LOCALS

Welcoming citizens who make visitors feel comfortable



### 1. NEW ZEALAND

▲ (3)



The warmth and hospitality of its citizens help make New Zealand the popular destination it is today.

- 2. Ireland ▲ (4)
- 3. Thailand ▲ (5)
- 4. Canada ▼ (2)
- 5. Australia ▼ (1)
- 6. Scotland
- 7. Sweden ▼ (6)
- 8. Fiji ▼ (7)
- 9. Bahamas
- 10. Italy

## FAMILIES

Providing diverse activities and offerings for visitors of all ages



### 1. CANADA

▲ (2)



Canada's variety of outdoor activities, natural wonders, events and cultural discoveries to explore make it this year's leading country for families.

- 2. Spain
- 3. Denmark ▼ (1)
- 4. Australia ▼ (3)
- 5. New Zealand ▲ (7)
- 6. Sweden ▼ (5)
- 7. Austria ▼ (6)
- 8. United States ▼ (4)
- 9. Ireland ▼ (8)
- 10. Italy ▼ (9)

## VALUE FOR MONEY

Offering the most in return for the price you pay



### 1. THAILAND

(1)



Famous for its authentic culture, spectacular beaches and noteworthy nightlife, Thailand is also one of the most affordable destinations in the world.

- 2. India ▲ (10)
- 3. Mexico ▲ (4)
- 4. Czech Republic ▼ (3)
- 5. Poland
- 6. United States
- 7. Malaysia
- 8. Turkey ▼ (7)
- 9. South Africa
- 10. Hungary ▼ (2)

## RISING STAR

On their way to becoming major destinations



### 1. CHINA

▲ (2)



By hosting the 2008 Olympic Games, China became one of the world's most-watched destinations. Its ancient civilization, natural beauty and revered artistic treasures make China a rising star.

- 2. United Arab Emirates ▲ (3)
- 3. Croatia ▼ (1)
- 4. Vietnam (4)
- 5. India
- 6. Cuba (6)
- 7. Costa Rica
- 8. Turkey
- 9. Iceland ▼ (7)
- 10. Russian Federation ▼ (9)

## STANDARD OF LIVING

Countries with the best quality of life



### 1. SWEDEN



With forward-thinking privatized pensions, low inflation and one of the highest rates of GDP per hour worked, Sweden is a world leader in living standards.

- 2. Norway
- 3. Denmark
- 4. Australia
- 5. Switzerland
- 6. Japan
- 7. Canada
- 8. Germany
- 9. New Zealand
- 10. United Arab Emirates

## IDEAL FOR BUSINESS

Considered best to do business in or with



### 1. UNITED STATES

(1)



The United States has the largest and most diversified economy in the world, providing the broadest array of business opportunities.

- 2. Germany
- 3. United Kingdom (3)
- 4. France (4)
- 5. Italy (5)
- 6. Australia (6)
- 7. China (2)
- 8. Austria
- 9. Canada
- 10. Japan (8)

## EASIEST TO DO BUSINESS IN

Welcoming and facilitating business culture



### 1. CANADA

▲ (3)



With a robust economy, approachable ethos and significant cost advantages, Canada is open to all languages, cultures and business opportunities.

- 2. United States ▼ (1)
- 3. Germany ▲ (7)
- 4. Denmark
- 5. Ireland ▼ (4)
- 6. United Kingdom ▼ (2)
- 7. Singapore ▲ (9)
- 8. Australia (8)
- 9. Japan
- 10. Switzerland ▼ (6)

## NEW COUNTRY FOR BUSINESS

The place where people would most like to start doing business



### 1. JAPAN



As a vibrant and prosperous country, Japan is seen as a great country to begin doing business in.

- 2. United Arab Emirates
- 3. Singapore
- 4. Canada
- 5. Qatar
- 6. Switzerland
- 7. Germany
- 8. Scotland
- 9. United States
- 10. Ireland

## CONFERENCES

Preferred off-site convention destination



### 1. JAPAN

▲ (6)

Japan is the most preferred country for conferences and conventions, given its technological advantages, meeting facilities and intriguing locales.

- 2. United States ▼ (1)
- 3. Singapore ▲ (4)
- 4. Germany ▼ (3)
- 5. Canada ▲ (8)
- 6. Switzerland ▼ (2)
- 7. United Arab Emirates ▼ (5)
- 8. United Kingdom
- 9. Qatar
- 10. Sweden

## EXTEND A BUSINESS TRIP

Where travelers want to extend business travel into personal vacation



### 1. AUSTRALIA

▲ (2)

Australia is a leading business destination that also offers a wide variety of great leisure attractions for professional business travelers.

- 2. New Zealand ▲ (8)
- 3. Scotland
- 4. Japan (4)
- 5. Ireland
- 6. United States ▼ (1)
- 7. Sweden
- 8. Canada ▼ (7)
- 9. Italy ▼ (3)
- 10. Thailand ▼ (5)

## POLITICAL FREEDOM

Noted for democratic institutions and civil liberties



### 1. NETHERLANDS

The Netherlands' liberal approach to public policy and legislation — on drugs, euthanasia and a host of other civic issues — make it one of the most politically free societies in the world.

- 2. New Zealand
- 3. Sweden
- 4. Denmark
- 5. Norway
- 6. Canada
- 7. Belgium
- 8. Australia
- 9. Switzerland
- 10. United Kingdom

## MOST LIKE TO LIVE IN

Where people would choose to live, outside their home country



### 1. AUSTRALIA

▲ (3)



Friendly people, ideal weather, natural beauty and a stable government make Australia the place where people most want to live.

- 2. New Zealand (2)
- 3. Canada ▼ (1)
- 4. Switzerland ▲ (8)
- 5. Scotland
- 6. Sweden ▼ (4)
- 7. United States ▼ (6)
- 8. Ireland
- 9. Germany
- 10. United Kingdom ▼ (7)

## QUALITY PRODUCTS

Producer of the most high-quality goods and services



### 1. JAPAN



Over the past several decades, Japan has built a global reputation for manufacturing high-quality products.

- 2. United States
- 3. Germany
- 4. France
- 5. Italy
- 6. United Kingdom
- 7. Switzerland
- 8. Canada
- 9. South Korea
- 10. Sweden

## DESIRE TO VISIT / VISIT AGAIN

The country travelers would most like to visit or return to



### 1. NEW ZEALAND



Its multitude of outdoor activities, warm and hospitable people, and captivating natural beauty make New Zealand the country most would like to visit or revisit.

- 2. Italy
- 3. Australia
- 4. United States
- 5. Maldives
- 6. Ireland
- 7. United Kingdom
- 8. Japan
- 9. Canada
- 10. Thailand

### ADVANCED TECHNOLOGY

The country where the latest technologies are most prevalent



1. JAPAN

Japan is seen as the leading nation in terms of technology, with notable contributions in the fields of electronics, automobiles, machinery, industrial robotics, optics and chemicals.

- 2. United States
- 3. United Kingdom
- 4. Sweden
- 5. Germany
- 6. Singapore
- 7. Switzerland
- 8. Finland
- 9. South Korea
- 10. United Arab Emirates

### ENVIRONMENTALISM

Most oriented toward environmental protection



1. SWEDEN

(1)

With a comprehensive plan for an "Environmental Sweden," the country's policy for ecologically-sustainable development endeavors to solve all major environmental problems for the next generation.

- 2. Norway
- 3. Switzerland ▲ (5)
- 4. New Zealand ▼ (2)
- 5. Finland
- 6. Iceland ▼ (4)
- 7. Denmark ▼ (6)
- 8. Germany (8)
- 9. Canada ▼ (7)
- 10. Netherlands

### MOST IMPRESSIVE LAST YEAR

The country with the most noteworthy performance in the past 12 months



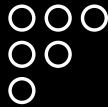
1. CHINA

As home to an abundance of natural, historical and cultural sites and host of the 2008 Olympics, China has captivated the world.

- 2. United Arab Emirates
- 3. Australia
- 4. New Zealand
- 5. Japan
- 6. Italy
- 7. Canada
- 8. United States
- 9. India
- 10. France

# Country Brand Advice

## FutureBrand



1. Focus. If the thought of rebranding your country is too daunting or the cost is too prohibitive, look for a key channel or specific place where you can begin to explore a new expression in a powerful way. A best-of-breed website, a state-of-the-art environmental exhibit or an internal branding program can create momentum.

2. Think beyond marketing. A compelling brand will increase awareness and consideration, but preference and advocacy will not improve if the country experience doesn't deliver the brand promise. Align broadly to improve infrastructure offerings and attractions.

3. Build advocates. Borrow best practices from other categories. Do you capture visitor/investor information and send quarterly richmails? Invitations to visit from the Tourism or Economic Minister? Thank-you notes after people visit the country, your website or tourist office?

4. In tough times, think differently. There are many alternative and innovative ways to promote a country brand at home and abroad. Advertising and trade shows are not the only ways to market. Grand gestures, innovative installations in key locations, targeted PR, conference hosting and environmental programs are all areas of opportunity.

## WEBER SHANDWICK

1. Invest in Office of Brand/Country Brand Managers who can work across all levels of government, as well as the public and private sectors. The country brand needs a dedicated advocate, enforcer and point of contact to truly succeed.

2. A destination's website is its global tourism office, open 24/7/365. The importance of an online strategy to communicate a destination's brand and experiences directly to consumers is critical. So why do so many destination websites look like travel brochures with outdated images? Revamp and redo.

3. Call it what you will, social media, social conversation or new media — the fact is public relations helps build the brand. Use this expertise to continue to expand conversations with the public.

4. Stay the course. Soaring operating costs, razor-thin margins for travel providers and lack of cash in both family and corporate budgets have created a bleak immediate future for travel, but not one without opportunity. Travel, even in challenging economic times, will adapt to new circumstances, but it will not retreat altogether and neither should travel marketers.

## KEY CONTACT

For more information about the Country Brand Index, marketing seminars, FutureBrand's services, or to purchase customized data, please contact:

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## METHODOLOGY

Three primary components inform the Country Brand Index. First is a global quantitative survey of almost 2,700 travel respondents from nine countries. This sample has a margin of error of  $\pm 1.9\%$  at the 95% confidence level. Participants were screened to include frequent international leisure and business travelers (who travel internationally at least once a year) between the ages of 21 and 65, with a balanced split between men and women. Topics included destination selection, country associations, overall awareness, past visits, intent to visit and willingness to recommend countries. Survey results were aggregated and weighted in proportion to each region's respective volume of travel consumption. The Top 10 Country Brand ranking was based on a combination of familiarity, overall rating of the country, desire to visit, advocacy and performance against country brand image attributes, weighted based on relative importance. The second component is a global expert survey of more than 30 international hospitality professionals in one-on-one interviews and/or surveys regarding their perceptions of countries as brands. Experts were recruited from multiple regions to ensure a diverse and representative sample. The third component is secondary research. A variety of relevant statistics and secondary sources have been referenced to complement the quantitative and expert surveys; for the complete listing of these, please refer to Sources.

## ACKNOWLEDGEMENT

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**WEBER SHANDWICK**

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