

# COUNTRY BRAND INDEX 2007

INSIGHTS, FINDINGS & COUNTRY RANKINGS



# FUTUREBRAND

Having worked with leading destinations all over the world, FutureBrand has unparalleled experience in country branding. We believe that understanding our clients' industries as well as they do is mandatory. However, it is FutureBrand's core philosophy that sets us apart.

Our point of differentiation begins with our name – our focus on the future – and a framework that helps countries build brands that are holistic and future-proof. A true "FutureBrand," for us, creates a new definition of brand excellence, which we shape in several ways.

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# COUNTRY BRAND PHILOSOPHY

## BRAND FRAMEWORK

First, with a methodology that understands the complexity of country branding, we develop a strategic framework for your brand, identifying its essential components and its core essence. Using insights and a deep category understanding, we define the opportunity and create a value proposition for your brand.

## AUDIENCES

For brands to excel, they need not only to be targeted, but also fine-tuned to meet the needs of diverse audience segments, each with distinct brand adoption requirements. Research provides us with a considered viewpoint on where your customers may reside along the spectrum of awareness and advocacy, and what can trigger their decisions to visit, reside or invest.

Our philosophy is straightforward because it is rooted in basic human truths. We uncover what people need and what motivates them. We then couple this with an understanding of when and how customers make country-related purchase decisions. Both are critical to ensuring marketing success and building brand differentiation for the long term. Lastly, we design brands that provoke positive reactions, create emotional bonds and deliver measurable results.





## POSITION & ACTIVATION

Determining the network of audiences and identifying a brand's true point of difference in any category is almost never straightforward. However, rarely is it as complicated as is the case with branding entire countries. The diagram above shows a key framework within our country brand philosophy that helps to identify compelling brand components and aids clients in positioning their brands globally.

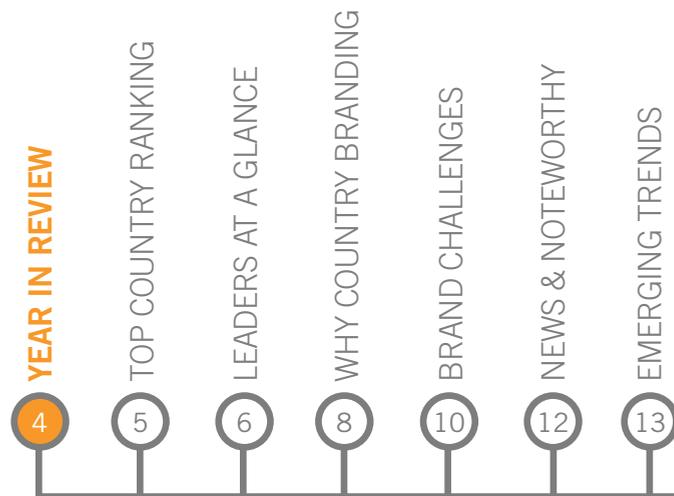
Equally vital to establishing a strategic platform is knowing why, how, where and when to activate a meaningful country brand. Creating an actionable blueprint for moving a brand forward, across multiple markets and to multiple audiences, is both critical and complex.

A "FutureBrand" is architected to leverage its core essence, to stand out relative to competitors and to engage customers for the long term. We believe that a "FutureBrand" represents excellence in branding, and we strive to create brands that think ahead and stay ahead.

# OVERVIEW

This is the third year that FutureBrand, a premier global brand consultancy, has issued its Country Brand Index. Each year it becomes more comprehensive, extensive and insightful. This year is no exception. Substantial qualitative and quantitative research was conducted, and experienced teams explored new trends, themes and opportunities in the category.

Countries, at the highest level, have a tremendous challenge: standing for a focused benefit while consistently communicating that idea across every level of government and to all key audiences in an effective and compelling way.



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|---|---|---|---|---|---|---|---|---|---|---|---|---|--|
| 0 | 1 | A | U | S | T | R | A | L | I | A |  |   |  |
| 0 | 2 | U | S | A |   |   |   |   |   |   |  |   |  |
| 0 | 3 | U | K |   |   |   |   |   |   |   |  |   |  |
| 0 | 4 | F | R | A | N | C | E |   |   |   |  |   |  |
| 0 | 5 | I | T | A | L | Y |   |   |   |   |  |   |  |
| 0 | 6 | C | A | N | A | D | A |   |   |   |  |   |  |
| 0 | 7 | S | P | A | I | N |   |   |   |   |  |   |  |
| 0 | 8 | N | E | W |   | Z | E | A | L | A | N   | D   |  |
| 0 | 9 | G | R | E | E | C | E |   |   |   |   |  |  |
| 1 | 0 | J | A | P | A | N |   |   |   |   |   |  |  |

# LEADERS AT A GLANCE

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

## AUSTRALIA

1

**POPULATION:**  
20,434,176

**GDP:**  
\$644.7 billion

**SIZE:**  
2,967,909 sq. miles

**AIRPORTS:**  
455

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
3.4%

**TOURISM & TRAVEL GROWTH:**  
2.8%

**TOURISM & TRAVEL INDUSTRY GDP:**  
5.1%

**EXPERTS SAY:**

"AUSTRALIA IS IMPRESSIVE AS A STRONG COUNTRY BRAND FOR THE WIDE RANGE OF VACATION EXPERIENCES THAT CAN BE ENJOYED."

## US

2

**POPULATION:**  
301,139,947

**GDP:**  
\$13.2 trillion

**SIZE:**  
3,794,083 sq. miles

**AIRPORTS:**  
14,858

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
5.1%

**TOURISM & TRAVEL GROWTH:**  
2.7%

**TOURISM & TRAVEL INDUSTRY GDP:**  
3.8%

**EXPERTS SAY:**

"THE US WILL REMAIN AMONG THE TOP PREFERENCES FOR TOURISTS FROM DEVELOPING COUNTRIES...THE AMERICAN DREAM IS STILL AN ASPIRATION FOR MUCH OF THE WORLD."

## UK

3

**POPULATION:**  
60,776,238

**GDP:**  
\$2.3 trillion

**SIZE:**  
94,526 sq. miles

**AIRPORTS:**  
471

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
2.7%

**TOURISM & TRAVEL GROWTH:**  
1.6%

**TOURISM & TRAVEL INDUSTRY GDP:**  
3.4%

**EXPERTS SAY:**

"THE UNITED KINGDOM, WITH PROFOUND HERITAGE AND CULTURAL RESOURCES, IS THE PERFECT COMBINATION OF HISTORY AND MODERNIZATION."

## FRANCE

4

**POPULATION:**  
63,713,926

**GDP:**  
\$2.2 trillion

**SIZE:**  
211,209 sq. miles

**AIRPORTS:**  
477

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
3.0%

**TOURISM & TRAVEL GROWTH:**  
1.8%

**TOURISM & TRAVEL INDUSTRY GDP:**  
4.1%

**EXPERTS SAY:**

"FRANCE REMAINS A TOP PRIORITY ON THE DESTINATION LIST FOR ITS LONG-LASTING ROMANTIC AND STYLISH IMAGE."

## ITALY

5

**POPULATION:**  
58,147,733

**GDP:**  
\$1.8 trillion

**SIZE:**  
116,306 sq. miles

**AIRPORTS:**  
133

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
3.5%

**TOURISM & TRAVEL GROWTH:**  
1.4%

**TOURISM & TRAVEL INDUSTRY GDP:**  
4.2%

**EXPERTS SAY:**

"THERE IS AN EXTREMELY STRONG ATTRACTION AND BRAND VALUE IN ITALY."

**CANADA**  
6

**POPULATION:**  
33,390,141

**GDP:**  
\$1.1 trillion

**SIZE:**  
3,855,103 sq. miles

**AIRPORTS:**  
1,337

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
4.1%

**TOURISM & TRAVEL GROWTH:**  
3.3%

**TOURISM & TRAVEL INDUSTRY GDP:**  
3.4%

**EXPERTS SAY:**

“CANADA HAS SUCCEEDED  
IN TAKING A LARGE  
COUNTRY AND CHANNELING  
THE MANY ATTRIBUTES  
UNDER ONE DIRECTIVE  
– ‘KEEP EXPLORING.’”

**SPAIN**  
7

**POPULATION:**  
40,448,191

**GDP:**  
\$1.1 trillion

**SIZE:**  
194,897 sq. miles

**AIRPORTS:**  
157

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
6.5%

**TOURISM & TRAVEL GROWTH:**  
2.8%

**TOURISM & TRAVEL INDUSTRY GDP:**  
6.8%

**EXPERTS SAY:**

“SPAIN IS OUTSTANDING  
BECAUSE IT COMMUNICATES  
ITS ATTRIBUTES AND  
DIFFERENT APPEALS  
CONSISTENTLY AND  
PROFESSIONALLY.”

**NEW ZEALAND**  
8

**POPULATION:**  
4,115,771

**GDP:**  
\$98.4 billion

**SIZE:**  
103,738 sq. miles

**AIRPORTS:**  
118

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
3.3%

**TOURISM & TRAVEL GROWTH:**  
1.9%

**TOURISM & TRAVEL INDUSTRY GDP:**  
6.9%

**EXPERTS SAY:**

“NEW ZEALAND IS A  
DESTINATION THAT NEVER  
FAILS TO DELIVER AN  
EXPERIENCE OF  
UNMATCHED BEAUTY.”

**GREECE**  
9

**POPULATION:**  
10,706,290

**GDP:**  
\$224 billion

**SIZE:**  
50,942 sq. miles

**AIRPORTS:**  
82

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
8.1%

**TOURISM & TRAVEL GROWTH:**  
4.0%

**TOURISM & TRAVEL INDUSTRY GDP:**  
7.4%

**EXPERTS SAY:**

“GREECE HAS GREAT  
COUNTRY ASSETS, BUT NEEDS  
TO BE STEADIER WITH ITS  
BRAND EFFORTS.”

**JAPAN**  
10

**POPULATION:**  
127,433,494

**GDP:**  
\$4.9 trillion

**SIZE:**  
145,883 sq. miles

**AIRPORTS:**  
175

**TOURISM & TRAVEL  
GOVERNMENT EXPENDITURE:**  
4.1%

**TOURISM & TRAVEL GROWTH:**  
3.2%

**TOURISM & TRAVEL INDUSTRY GDP:**  
3.8%

**EXPERTS SAY:**

“THE JAPANESE GO TO  
CONSIDERABLE ECONOMIC AND  
SOCIAL LENGTHS TO PRESERVE  
THE HISTORY AND HERITAGE OF  
THEIR COUNTRY.”

# WHY COUNTRY BRANDING?

Unraveling the complexity of countries and using their richness as an advantage rather than a hindrance is one of the powerful opportunities and unique aspects of country branding. This, however, must be done with great care and effort. It is not an excuse to simply be everything to everyone or to develop a brand without clear meaning, motivation and cohesiveness. 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.

## BENEFITS

- Provides the “glue” (consistency) among political, social and economic pillars
- Defines how the country’s own citizens and the world perceive it
- Balances substance and form – perception and reality
- Optimizes strategic objectives across political, FDI, export, tourism, etc.
- Creates a seamless connection between the country’s strategic intent, its marketing and its experience
- Delivers a unifying platform that builds synergy, allowing for cross-promotion and public and private sector alignment









# CHALLENGES IN A SATURATED MARKETPLACE

- Determining who is responsible for managing and maintaining a country brand
- Fixing a declining country image that is negatively affecting visitor and/or investment interest
- Responding to increased competition from neighboring or emerging countries
- Establishing the degree of linkage between country, region and city brands
- Creating and enforcing brand and marketing guidelines for government and private agencies
- Assessing marketing plans to determine if media spend is being strategically considered
- Creating a compelling environmental presence and sense of place that further the country's branded experience
- Launching an internal branding program to ensure that citizens are ambassadors of the brand
- Linking multiple government agencies under one core marketing umbrella to create synergy and cross sell

## NEWS & NOTEWORTHY

Travel and Tourism is becoming one of the world's highest priority industries and an increasing catalyst for construction and manufacturing. In 2007, the public and private sectors combined are expected to spend almost \$1.2 trillion on new Travel and Tourism capital investment worldwide, a figure that is expected to more than double by 2017. <sup>2</sup>

**252 MILLION** INTERNATIONAL TOURIST ARRIVALS FROM JANUARY THROUGH APRIL OF 2007. THIS FIGURE IS A 6% INCREASE COMPARED TO THE SAME PERIOD IN 2006. <sup>3</sup>

By the end of this year, Travel and Tourism is set to account for 10.7% of global GDP and more than 231 million jobs. <sup>4</sup>

Long-haul travel worldwide will grow faster, at 5.4% per year over the period 1995-2020, than will intraregional travel, at 3.8%. <sup>5</sup>

**\$2.97 TRILLION** ESTIMATED EXPENDITURES FOR TOTAL WORLD PERSONAL TRAVEL AND TOURISM IN 2007, WITH BUSINESS TRAVEL AN ADDITIONAL \$743 BILLION <sup>6</sup>

Low-cost carriers are witnessing booming growth, with global sales increasing by a staggering 250% over the last five years, generating \$42.7 billion. <sup>7</sup>

Cultural destinations have witnessed an impressive increase in value sales of 51% from 2000 to the present. Cultural tourists also stay longer and spend more per day than do any other travelers (including business travelers). <sup>8</sup>

# EMERGING TRENDS

FutureBrand's expertise in the country branding category allows us to anticipate shifting behaviors and patterns to stay future focused and ahead of the curve. Several trends we reported in years past continue to be prominent, notably Adventure Travel, Medical Tourism, Semipermanent Vacations, Spa Focus and Eco-Friendly Trips.

An overarching trend this year is the idea of paradox and distinction. The notion of discrete and disparate types of travelers is becoming a thing of the past. Now you can work with volunteer organizations on one vacation and stay in luxury accommodations on the next. You can take advantage of VIP travel convenience services on your way to an off the beaten track nation undergoing political change. What's more, travelers are continuing to look for new offerings, new attractions and new ways to enjoy more of everything.

## EXPLORATION

### ATTRACTION OF "OTHER"

There is a growing interest in exploring cultures with unique political or religious environments. Cuba, North Korea, Iran and Pakistan all represent countries in transition. Rich histories meet political flux. Despite safety concerns, many seek to recreate and revisit famed cities of the past and at the same time witness modern defining moments of history.

### DOWN UNDER

Referring to the growth of underwater vacations, below-sea trips are also on the rise. Across the Bahamas, China and Dubai, underwater hotels and restaurants are becoming extreme travel destinations. Poseidon Undersea Resort is home to 20 below-sea and 22 on-shore suites in the Bahamas. Scuba and deep-sea diving camps and personal submersibles are also gaining popularity.

### VIRTUAL TOURISM

Every day, millions of people already travel to fantastical destinations via dozens of virtual reality worlds such as World of Warcraft, Matrix Online or Second Life. You can find a room at the virtual loft hotel, a Second Life model of Starwood Hotels' new brand to be launched in the real world in 2008. With all this adventure at your fingertips, it's easy to get lost, a problem that has spawned a whole new industry of travel agencies, tour guides and digital guidebooks to cater to the confused virtual tourist. STA Travel has launched a presence on Second Life, offering up what it calls a "Home for the Virtual Traveler," with guidance to the must-see places and adventures in this online world. Virtual tourism offers a new alternate vacation, whether it be lying on a beach, enjoying a ski trip or climbing archaeological ruins. Or all three – in the same hour. <sup>9</sup>



**CUBA, A COUNTRY IN TRANSITION, IS ATTRACTING INTERNATIONAL TRAVELERS**

# EMERGING TRENDS

## AUDIENCES & ATTITUDES

### VOLUNTOURISM

As a response to disaster aid, growing global village consciousness and a need to contribute to society in ways big and small, more and more travelers are planning whole and segments of trips around humanitarian purposes. From building homes and teaching English to working at refugee camps and participating in animal conservation research, the menu of volunteer vacation options is growing.

### ACCOUNTABILITY

Travelers are becoming more environmentally responsible, and are asking airlines and hotels to rally around the cause. The result is that consumers and pioneering travel brands are partnering to minimize their impact on the environment. Silverjet, with a mandatory carbon dioxide offset fee, became the first carbon-neutral airline. Car rental companies such as Hertz, Budget and Avis are adding more fuel-efficient cars to their fleets, while leading luxury hospitality providers, including Fairmont, Leading Hotels of the World and Luxury Explorer, are offering carbon-offset programs. Nonprofits and online vendors are inviting travelers to calculate their CO<sub>2</sub> footprints and then purchase offsets or donate to the websites' tree-planting projects.

### EASIER, FASTER, BETTER

On the ground and in the air, companies are responding to travelers' desires for simplification and ease. Within airports, companies such as Fly Clear allow travelers to pay registration and annual membership fees in return for expedited service through security lines. Some hospitality brands are also creating their own airport lounges as well as providing "flying kits" for customers to make the trip home more pleasant.



### TRAVELERS ARE PAYING MORE FOR VALUE-ADDED SERVICES

### EXPERTS ON BOARD

Travelers are combining their hobbies and passions with their vacations. Rather than visit an all-inclusive resort, many are preferring to focus on cooking schools, wine tasting, archeological digs or jewelry making.

### ADULTS ONLY

Perhaps it is due to the growing population of adults without children, those seeking short escapes from family life or those commemorating with friends abroad, adult-only trips are on the rise. Resorts are catering to this by offering adult-only wings and amenities, and we anticipate that airplanes may eventually offer adult-only sections as well.

## MORE OF EVERYTHING

### SPA EXPANSION

Whereas the past few years have witnessed the infiltration of spas into hotels and residence clubs, today's focus is on the expansion of spa services. Spas are promoting 360-degree healthy living and offering treatments around preventative health care, spiritual wellness, and metaphysical and sensorial awakening. From the United States to Bangkok, spas are advertising diverse diagnostic and consulting services such as astrology, sleep assessments and aromatherapy. Spas may try to capitalize on and co-opt some of the Medical Tourism that continues to abound.

### BRAND LIFE

Now brands outside of the hospitality sector are extending into the destination business and creating offerings that allow people to live that brand 24/7. Fashion labels such as Armani and Versace were the first to infuse hotels from Dubai to Australia with their signature aesthetics. Today, luxury car companies are following suit. Ferrari has teamed up with Aldar Properties to launch an entertainment development in Abu Dhabi in 2008. With a racetrack, rides and simulators, the destination invites visitors of all ages to explore Ferrari and the company's history. The complex will also feature hotels and retail, residential and hospitality components extending the brand in multiple ways, all taking inspiration from Ferrari car designs.

### A NEW VEGAS

Hong Kong natives and international travelers and investors are flocking to Macau, China. It appears to have overtaken the famed Las Vegas Strip as the world's top gambling destination. In 2006, Macau's gaming receipts grew by 22%. PricewaterhouseCoopers recently predicted that Macau's casino gambling revenue would reach \$12 billion in 2010.<sup>10</sup>

### DESTINATION: MUSEUM

What started with the Guggenheim in Bilbao has become a well-founded global trend – museums franchising and becoming key destinations in international cities. In addition to having its own Guggenheim, designed by Frank Gehry, Abu Dhabi will also be home to the first international expansion of the Louvre, involving famed architect Jean Nouvel. Shanghai will also open a branch of the Georges Pompidou Center in 2010.

### SPORTS FIRST, COUNTRY BRAND SECOND

Global sporting events have always attracted major tourist followings. As notable “rising-star” countries, China and South Africa, respectively, are likely to become even more popular destinations in the wake of exposure from the 2008 Olympics and 2010 FIFA World Cup. More and more countries are competing to host these games, not only to receive events-driven revenue and build up infrastructure, but also to draw attention to their country brands.



# TRAVEL CONSIDERATIONS

FutureBrand's global category research identifies the travel considerations that people prioritize when selecting a country to visit. There is a clear link between the highly ranked substance and style and the experiential drivers that leisure and business travelers find imperative. Escapism, Discovery, Affinity and Delight are key drivers of country brand success and should be used as evaluation filters to assess what a nation can bring to the marketplace.

## SUBSTANCE

LODGING/RESORT OPTIONS

FRIENDLY LOCALS/STAFF

SAFE AND SECURE

VALUE FOR MONEY

WEATHER

## STYLE

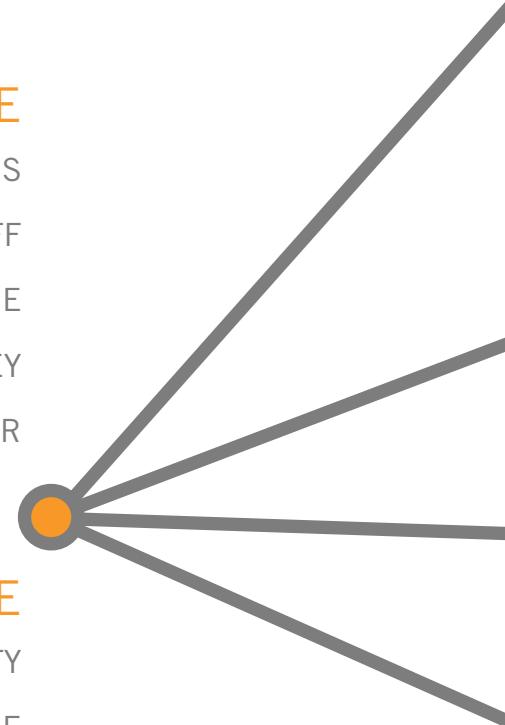
NATURAL BEAUTY

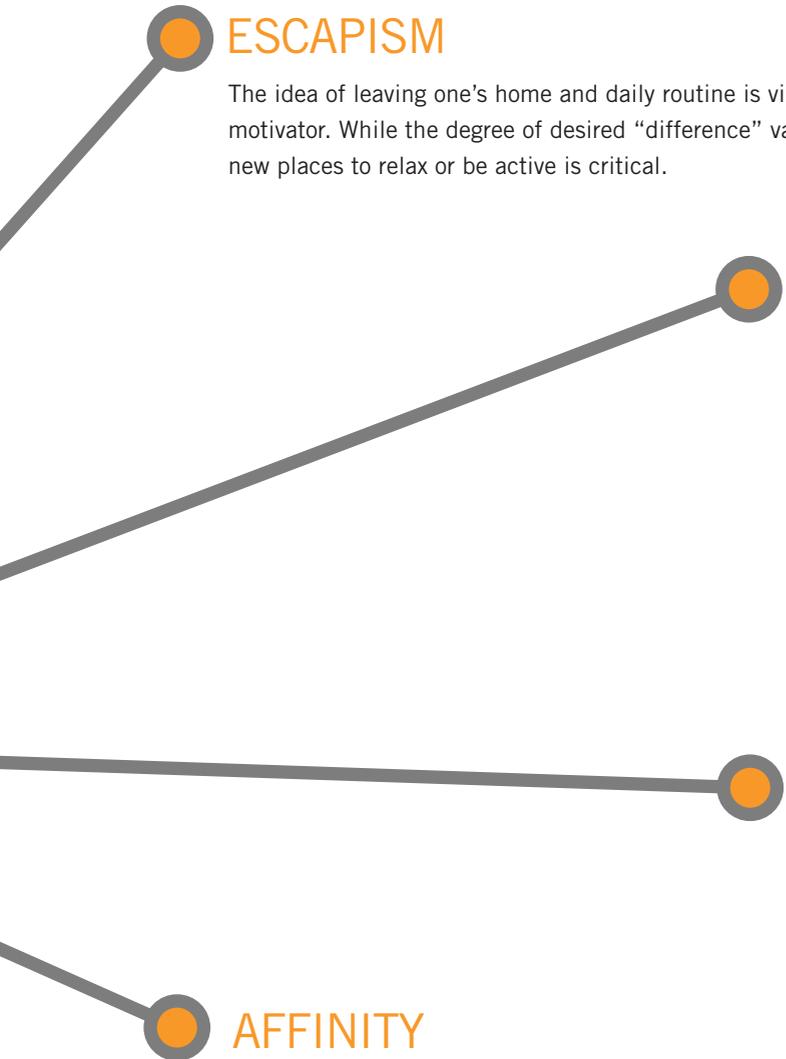
ART/CULTURE

HISTORICAL POINTS OF INTEREST

REST/RELAXATION

AUTHENTICITY





## ESCAPISM

The idea of leaving one's home and daily routine is virtually a universal travel motivator. While the degree of desired "difference" varies among travelers, finding new places to relax or be active is critical.

## DISCOVERY

Not only being somewhere different but also doing something different is a significant driver. Being able to provide something genuine, engaging and exotic is becoming a baseline requirement of destinations.

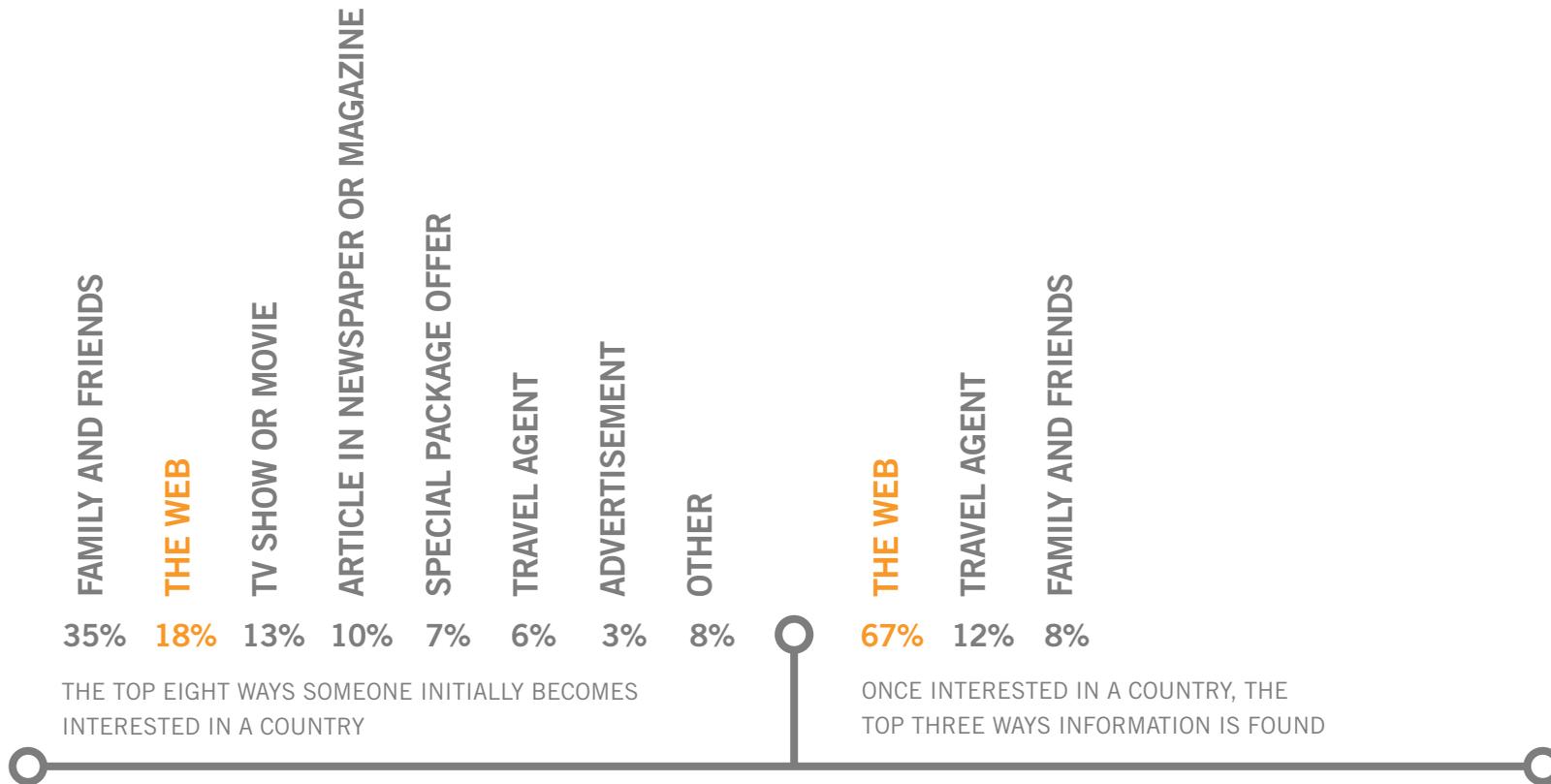
# BEHAVIORAL DRIVERS OF DESTINATIONS

## DELIGHT

The most primal driver, delight celebrates the sensorial experience of a country – its sounds, smells, sights. A national cuisine, a favored spice, a well-known monument... all help capture visitor intrigue.

## AFFINITY

Feeling safe, comfortable and able to communicate amidst new and exciting experiences is still a necessity for most travelers today. The ability of visitors to connect to a nation and its people contributes to a country's success as a true destination.



# CHANNEL IMPORTANCE IN DESTINATIONS

## THE WEB CONTINUES TO DOMINATE

Similar to the results of the last two years, the Web continues to be an overwhelmingly significant channel for country information. Convenience, depth of content and breadth are key factors in its success.

New, however, is the growing importance of consumer-generated content (CGC). Consumers are increasingly embracing their peers' voices online: 20% rely on CGC when planning travel, and they consider this content more credible than reviews from professionals or information from the countries themselves. <sup>11</sup>



# THE WORLD OF THE WEB

With numerous and perpetually expanding ways to explore the category of countries, the Web continues to be the leading channel for global travel. By covering every imaginable need of prospective travelers, the Web moves ahead as the prime and only single source for information, advice, socialization and transactions.

The Web is now making travel more tangible, personal and accessible through the use of blogs, photosharing, podcasts and virtual travel. Individuals are no longer visiting strange lands with strange people; they are just next-door neighbors. With the emergence of sites like CouchSwap and CouchSurfing, travelers can arrange accommodations in the home of a local. This underlines the fact that many visitors are looking to further immerse themselves into the culture they are visiting, with some bypassing traditional hospitality offerings and brands.

Social networking and blogging have become crucial parts of the travel experience, often disintermediating countries from the process and putting the customer squarely in control. Blogs, both general and targeted, are encouraging people to exchange and relive their country experiences and adventures. By providing a forum for travelers to share these things, sites like Facebook, TravelBlog and Flickr provide Web users an ideal way to obtain feedback regarding hotels, attractions and the local people. They are the new travel guides. Some blogs can also be competitive, incorporating maps that indicate respondents' previous travels and questionnaires on how much people know about different destinations. Online, travel is becoming a competitive sport,

with members competing to be named most worldly traveler on their sites of choice.

Google Earth can now show tourists real 3-D satellite images of places they are thinking of visiting, while also giving them the ability to view photos other travelers have posted and read blogs about their adventures. When blogs are not enough, video is another option. Go to YouTube, enter the name of a destination and in minutes there are dozens of videos featuring travel images and advice. No time to sit in front of the computer? Just download a travel podcast, featuring anything from advice on touring Italy to a discussion of life in India. Podcasting condenses a detailed travel guide and advice blog into one simple on-the-go tool.

With the emergence of Virtual Travel and sites like Second Life, participants can travel the world in one evening, from the Louvre in Paris to the Great Pyramids of Egypt. Featuring a mixture of real countries and imaginary lands, virtual travel allows travelers to stay in hotels and youth hostels and employ the services of travel agencies to help them navigate the endless options of virtual travel.

Whether it is to seek out the opinions of others, join a network of like-minded travelers, learn more information, immerse themselves in a destination experience or create a virtual one, travelers are turning to the Web to find these options and more. Countries should find ways to capture and leverage these elements or risk becoming left out of the single biggest global travel channel and new world of communication.

THE WEB IS NOW

MAKING TRAVEL

MORE TANGIBLE,

PERSONAL AND

ACCESSIBLE

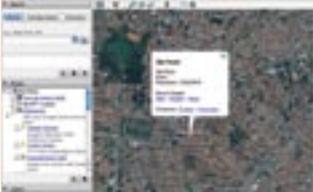
THROUGH THE

USE OF BLOGS,

PHOTOSHARING,

PODCASTS AND

VIRTUAL TRAVEL

| SITE  | URL  | MESSAGING   | DESCRIPTION  | TAKE-AWAY   |
|---|--|---|--|---|
|    | <p><b>Google Earth</b><br/>earth.google.com</p>              | <p>Tagline:<br/>Explore, Search<br/>and Discover</p>  | <p>Combines Google Search<br/>with satellite imagery,<br/>maps, terrain and 3-D<br/>building views</p>                   | <p>Through blogs and links to<br/>websites pertaining to the<br/>location, Google Earth helps<br/>you to learn more</p>                         |
|    | <p><b>Couch Surfing Project</b><br/>www.couchsurfing.com</p> | <p>Search for a couch now!</p>  | <p>A worldwide network<br/>for making connections<br/>between travelers and the<br/>local communities<br/>they visit</p> | <p>Allows you to search for<br/>members around the world<br/>who have available space<br/>for room and board</p>                                |
|    | <p><b>Second Life</b><br/>www.secondlife.com</p>             | <p>Tagline:<br/>Your World.<br/>Your Imagination.</p>                                       | <p>A 3-D virtual world that is<br/>created entirely by its<br/>residents (members)</p>                                   | <p>Allows you to visit real and<br/>imaginary countries and<br/>landmarks (e.g., Ireland<br/>and the Louvre now have<br/>virtual presences)</p> |
|   | <p><b>InFlightHQ</b><br/>www.inflighthq.com</p>              | <p>Tagline:<br/>Tools, Tips, and<br/>Techniques for being<br/>productive at 30,000 feet</p> | <p>A blog that publishes<br/>tools, tips, and techniques<br/>for tech-savvy business<br/>travelers</p>                   | <p>Provides access to helpful<br/>business travel tips</p>  |
|  | <p><b>Travelistic</b><br/>www.travelistic.com</p>            | <p>Tagline:<br/>Videos For Travelers</p>  | <p>A video site for travelers</p>  | <p>View destinations from<br/>around the world</p>  |

# 2007 EXPERTS

**SOLEDAD AGUADO**

Editorial Director,  
Huespedes Magazine  
Argentina

**CELCILIA ARAVENA BAEZ**

Executive Account Coordinator,  
Travel Express  
Chile

**FRIEDERIKE VON BELOW**

Travel Manager,  
Booz Allen Hamilton GmbH  
Germany

**MARCELO BICUDO**

Marketing Director,  
Atlantica Hotels International  
Brazil

**DON BIRCH**

President & CEO,  
Abacus International  
Singapore

**BILL CALDERWOOD**

Managing Director,  
Skyrail-ITM  
Hong Kong

**GUSTAVO CAPECE**

Tourism Manager,  
Gustavo Capece  
Argentina

**JAMES CASSIDY**

General Manager Stayz,  
Fairfax Digital  
Australia

**JORGE SCHAEERER CONTRERAS**

Professor,  
Professional Institute of Chile  
Chile

**CARLA D'ELIA**

Vice President,  
de Dios Editors  
Argentina

**THOMAS L. DOORLEY, III**

CEO,  
Sage Partners  
United States

**XINYUE FENG**

Attorney,  
Dewey Ballantine  
China

**JEFFREY FLOWERS**

President,  
Marco Polo Hotels  
Hong Kong

**HUACHEN FU**

Account Manager,  
ZTE Communications  
Benin

**JAVIER FUICA**

Deputy Editor,  
Domingo en Viaje, El Mercurio  
Chile

**HILMAR GERNET**

CMO,  
Hapimag  
Switzerland

**ADAM GOLDSTEIN**

President and CEO,  
Royal Caribbean Intl.  
United States

**SANDY GRANT**

CEO,  
Hardie Grand Publishing  
Australia

**FREDDY NEIRA GUZMAN**

Executive Director, Int'l Center  
of Tourism Studies of Chile  
Chile

**WANG HAIBO**

Editing Director,  
Beijing Tourists' Magazine  
China

**RICARDO BUENO HIDA**

Director,  
Hida.com  
Brazil

**ZHANG JING**

Reporter,  
China Tourism News  
China

**JOHN KENT**

CEO,  
Youtravel.com  
UK, Italy, Greece

**MAJA KONECNIK**

Assistant Professor,  
Ljubljana University  
Slovenia

**GANG LI**

Associate Professor of Tourism,  
University of Surrey  
United Kingdom

**LV LI**

Editor,  
National Geographic Traveler  
China

**JAIR JOAZ LIMA**

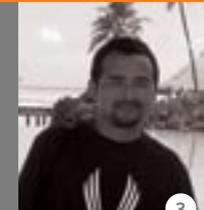
Marketing Management,  
Monreale Hotels  
Brazil



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**EXPERT PHOTOS:**

1. Adam Goldstein 2. Alfio Messina 3. Andy Ying Keung Tsui 4. Arnie Weissman 5. Bert van Walbeek 6. Bill Calderwood 7. Carla D'Elia 8. Cecilia Aravana Baez 9. Chen Zhou 10. Darrell Wade 11. Don Birch 12. Enio Pinto Miranda 13. Freddy Neira Guzman 14. Gonzalo Zegarra Mulanovich 15. Gustavo Capece 16. Hernan Passalacqua 17. Huachen Fu 18. Jason Shugg 19. Javier Fuica 20. Jeffrey Flowers 21. John Kent 22. Jorge Schaerer Contreras 23. Maja Konecnik 24. Ricardo Bueno Hida 25. Soledad Aguado 26. Tetsuo Nakayama 27. David Spencer 28. Thomas L. Doorley, III 29. Vincent Vanderpool-Wallace 30. Xinyue Feng

**ZHAO LINGFANG**

Editor,  
Cosmopolitan  
China

**JOSIMAR MELO**

Journalist, Food and Wine Writer,  
Basilico Gastronomy  
Brazil

**ALFIO MESSINA**

Director of Corporate Business  
Development, Alitalia  
Italy

**ENIO PINTO MIRANDA**

Head in Office,  
Tyche MKT Prod  
Brazil

**GONZALO ZEGARRA MULANOVICH**

Editor-in-Chief and CEO,  
Apoyo Publications  
Peru

**TETSUO NAKAYAMA**

Director of MICE,  
JTB Inc.  
Japan

**HERNAN PASSALACQUA**

CEO,  
Fitzroy  
Chile

**BAI QING**

Lifestyle Editor,  
Elle China  
China

**DING QUINGFEN**

Reporter,  
China Daily  
China

**ANTONELLA SALEM**

Tourism Editor, Diário do Comércio  
de São Paulo and Taste Net  
Brazil

**JASON SHUGG**

Global Product Marketing Manager,  
Lonely Planet  
Australia

**MIKE SIMON**

Divisional Sr. VP Corporate  
Communications, Emirates Airlines  
UAE

**KATHY SMITS**

Director, Beverly Hills  
Conference & Visitors Bureau  
United States

**DAVID SPENCER**

CEO, Leisurecorp LLC,  
A Dubai World Company  
UAE

**MIKE STARLING**

Deputy Editor, Destinations  
of the World News/WNN Limited  
UAE

**AURÉLIE TOCCO**

Events Manager,  
Majestic Barrière Hotel  
France

**ANDY YING KEUNG TSUI**

Project Manager,  
JNET Co. Ltd.  
Hong Kong

**BERT VAN WALBEEK**

Managing Coach,  
The Winning Edge  
Thailand

**VINCENT VANDERPOOL-WALLACE**

Secretary General/CEO,  
Caribbean Tourism Organization  
Barbados

**JERONIMO VAQUEIRO**

General Manager,  
Tropical Tours  
Bolivia

**DARRELL WADE**

CEO and Co-Founder,  
Intrepid Travel  
Australia

**DAVID WAREING**

Global Brand Manager,  
HotelClub.com  
Australia

**ARNIE WIESSMANN**

Editor in Chief,  
Travel Weekly  
United States

**KEVIN WONG**

Professor, The Hong Kong  
Polytechnic University  
China

**SAM YAO**

Senior Feature Reporter,  
Travel Beat, Commercial Times  
Taiwan

**CHEN YIMIN**

Editor,  
World Traveler  
China

**CHEN ZHOU**

Senior Account Executive,  
Ruder Finn Public Relations  
China

# VIEWS FROM THE EXPERTS

## NO SHORTAGE OF WEALTH

Experts reiterate that luxury, while becoming more mainstream, is still a considerable travel factor and influencer.

“Wealthy travelers are always seeking new levels of luxury and new exclusive enclaves, as well as returning to the tried and true luxury locales of the world.”

“With global wealth and travel becoming more accessible to a larger population, we see a dramatic ‘raising of the bar’ in the more affluent tourism sector.”

“The cash-rich aging population and empty nesters in the Western Hemisphere will drive business for the luxury, indulgence and self-discovery sectors.”

“Places like Dubai are proof that exclusive luxury is alive and well.”

## HIGHER STANDARDS

Travelers across all price points are expecting more from their travel experiences. Renovations, refurbishments and options reign supreme.

“An opportunity exists to upgrade airports and make them more entertaining and user-friendly, since the amount of time spent in airports has lengthened – it also forms the first/last impression of the destination.”

“The resort that was fine for annual holidays in the 80s just won’t cut it now unless it refreshes or even reinvents itself. This puts pressure on the entire tourism industry as operators of all types need to innovate in the products they offer, the countries they market and even the very business models they operate in.”

“Travelers at all levels of budget expect more from their vacation. Even some youth hostels now offer ‘premium’ rooms.”



ACCORDING TO THE EXPERTS

**COUNTRIES THAT MARKET THEMSELVES THE BEST:**

1. AUSTRALIA

2. SINGAPORE

3. SPAIN

## INFORMATION IS POWER

Experts caution that travelers are seeking and finding more information. Much of this is coming from other travelers and not directly from official countries or their authorized sites.

“Consumers are adopting online travel advice, search and bookings at a faster rate than ever. They are seeking and requiring a greater level of information in their search to refine and make their choice of where to travel and how to experience a destination.”

“Technology is a friend but remains a significant threat to specific products or channels within the industry. Disintermediation was the buzzword of the late 90s that has lost cache – but I think it is as relevant as ever to the unwary or lazy incumbent.”

“I say beware to countries; lead, don’t follow, regarding providing technology and information to constituents.”

## ECO-FRIENDLY HAS ARRIVED

Environmental awareness is becoming a more popular expression of traveler interest, according to global experts. Countries may want to listen.

“Discussions revolving around climate change have driven a lot of decisions in travel and hospitality this year. Most people are getting green or at least trying to appear green.”

“More people are more aware of the positive and negative elements of travel and how it affects the environment. Some are now taking action rather than just thinking about it.”

“The emerging trend for carbon offsetting will perhaps drive more travelers toward domestic holidays.”

“Costa Rica should take the time to maximize its earlier brand efforts and capitalize on this trend.”



ACCORDING TO THE EXPERTS

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

1. CHINA      2. UNITED STATES      3. BRAZIL

# COUNTRY BRAND ANALYTICS

## DIMENSIONING COUNTRY BRAND STRENGTHS

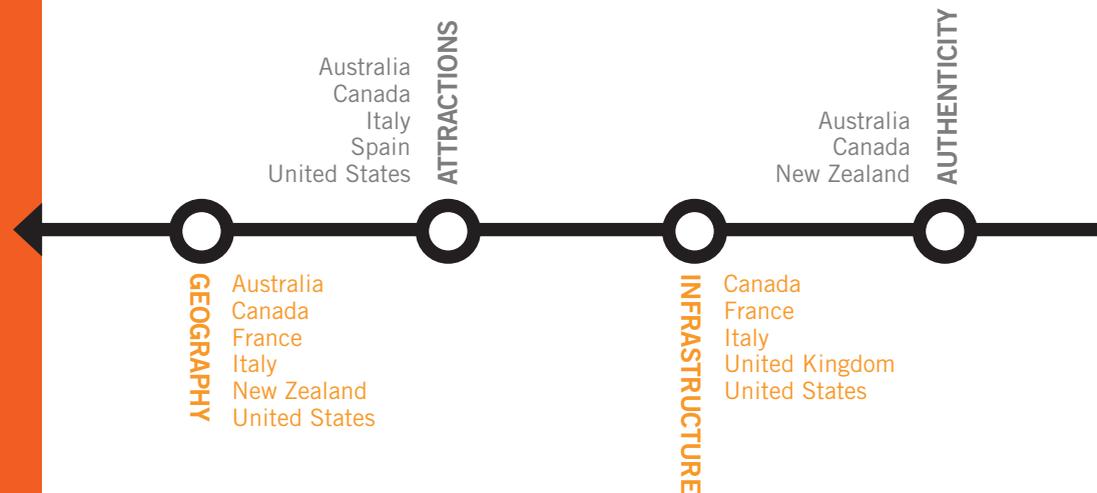
FutureBrand has developed a Country Brand Framework, comprising eight essential country brand dimensions. The framework, mentioned earlier in our philosophy, is specific for country brands and crystallizes how we look at the category. It allows us to identify the strengths of countries and their leverageable assets for the development of compelling country brand platforms. Of the eight dimensions, 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.

## FRAMEWORK DIMENSIONS

The eight key dimensions of a country brand are divided into two classes. Geography, infrastructure, governance and economy make up the needs-based dimensions. Attractions, authenticity, culture and ethos are the dimensions that address wants. Each of the eight elements of the framework is a composite of multiple attributes.

To determine which of the Top 10 Country Brands are the top performers in each dimension, we examined the relevant attribute ratings measured as part of our global quantitative research along with complementary rankings from secondary research sources.

## 2007 TOP 10 COUNTRY BRANDS THE STRONGEST PERFORMERS BY DIMENSION



## OBSERVATIONS

Based on how the strengths of the overall Top 10 Country Brands align with the eight dimensions of the framework, it is clear that there is no one formula for country brand success. It is significant to note, however, that all ranked brands are represented within the framework model. Every Top 10 brand was notable in at least two elements of the framework and six of the Top 10 countries were in over half of all components.

None of the Top 10 is strong across all eight dimensions, indicating that success has more to do with effectively leveraging the assets the country has than trying to establish strengths across each dimension. Australia, the number one ranked brand in 2006 and 2007, leverages strengths that span five dimensions.



## WANTS ORIENTED

- **ATTRACTIONS:** The diversity and quality of interesting and unique places to visit, as well as things to see and do
- **AUTHENTICITY:** The unique character of the populace along with the texture of local life, including rituals, programming and events
- **CULTURE:** The arts, crafts, intellectual pursuits and creative environment
- **ETHOS:** The customs, beliefs and mores that combine with the history to create a distinctive mystique

## NEEDS ORIENTED

- **GEOGRAPHY:** Natural resources, topography and landforms
- **INFRASTRUCTURE:** Technology, communications, transportation and health care availability and quality
- **GOVERNANCE:** The degree of effectiveness in the way the country is ruled, as evidenced by political freedom, safety and security
- **ECONOMY:** The effectiveness of the country in producing and distributing wealth to create a high standard of living

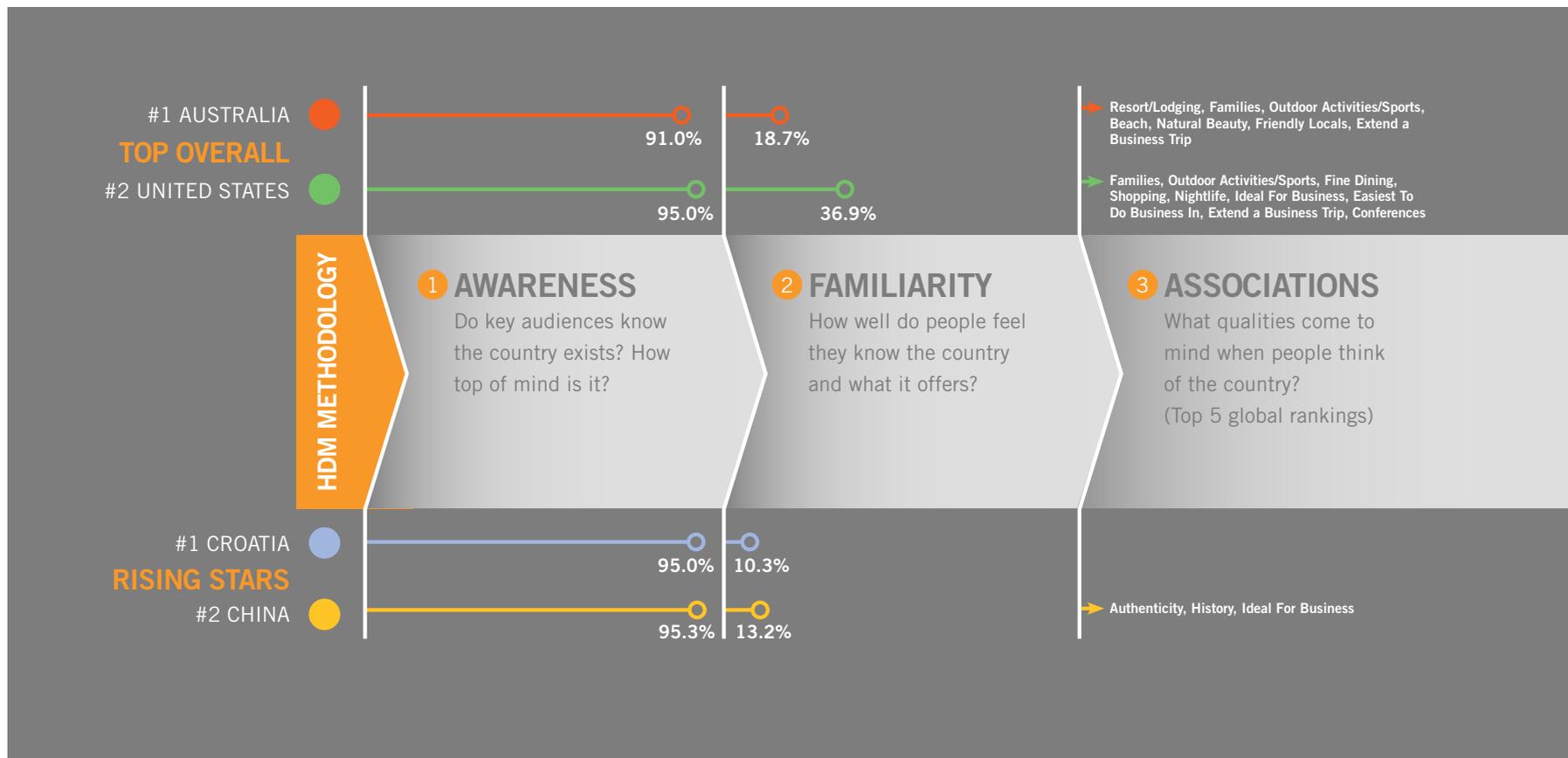
France and Canada each achieved a Top 10 ranking in 2007, and both countries show strengths in six dimensions. New Zealand and Greece, in the Top 10 in both 2006 and 2007, each leverage strengths across two dimensions, but in very different ways: New Zealand leverages its authenticity and diverse geographic assets to create a desirable country brand; for Greece, the formula involves culture and ethos.

An examination of the performance of the Top 10 Country Brands against the various attributes that underlie the framework dimensions shows that there is significant variability in the brand assets of each country – at least with regard to geography, attractions, authenticity, culture and ethos.

While not every Top 10 Country Brand shows exceptional strengths in infrastructure, governance and economy, each of the Top 10 is strong in the three needs-based dimensions (i.e., they place within the top 20% of all country brands). This suggests that a modern infrastructure and a safe and secure environment along with political freedom and a fairly high economic standard of living are cost-of-entry requirements for achieving Top 10 Country Brand status. The lack of top 20% performance in the needs-oriented attributes does not prevent a country from being an attractive destination – it simply precludes the country from achieving Top 10 Country Brand status.

# HDM: A STRUCTURED VIEW OF THE CUSTOMER MINDSET

The Hierarchical Decision Model (HDM) is a proprietary FutureBrand methodology used to facilitate an understanding of the place a brand occupies in the mindset of target audiences. The model is based on how people process information and form relationships with brands, the kind of relationships that, if managed well, lead to preference, purchase and advocacy. Effective marketing requires identifying where a country is along the HDM continuum and aligning its marketing tactics with that place. <sup>12</sup>



## IMPLICATIONS

- HDM makes it clear how much more developed the two leading overall country brands are compared to this year's top rising stars.
- Just as clearly, the U.S. is the most fully developed country brand in the world, leading in familiarity, breadth of strong associations, consideration, preference, visitation and advocacy.
- Opportunities for the U.S. brand consist of taking further advantage of the country's diverse assets to deepen the associations with the brand and to increase brand preference, where the country's lead is slimmest.
- Australia, though the number one overall country brand for the last two years, can still improve its familiarity. Australia could also benefit from better understanding its advocacy levels, the percentage of visitors who would recommend the country.
- As emerging country brands, China and Croatia must focus on generating broader overall familiarity and a better understanding of their country brand assets. Without focusing on familiarity and associations, there is no way for either country to substantively impact the level of consideration and preference its brand is generating in the global marketplace.



# COUNTRY TYPOLOGIES

Country brands vary in how they position themselves in the global marketplace. Most attempt to create a differentiated and compelling offering, although many appear to be indistinguishable from each other, as we have noted in previous years. Clearly, few countries have a unified brand whereby the image, associations and brand value impact the perception of that country's products, population, investment opportunities and foreign aid. Today, tourism still speaks the loudest and is generally the most marketed aspect of a nation. Additionally, tourism relates directly to the performance of other core areas of government like infrastructure, economy and governance.

We have identified seven typologies that are common to the category. As a group, they encompass the brand directions of the majority of ranked countries mentioned in this Index. Interestingly, the typologies appear to be a departure from traditional marketing orientations that often suggest that a brand focus on process (how you do something), purpose (why you do something) or personality (who you are). While this last option has some hints in country branding, many countries orient themselves more around core assets: loftier concepts such as character, cultivation and rarity.

While many countries try to rally around one typology, a growing trend is to focus on diversity. This is largely depicted as a multiplicity of offerings and a richness of the country experience, which is counter to many conventional brand strategy approaches that recommend a single-minded focus. Clearly, many countries are realizing that what makes them special is their variety and depth of offerings. They celebrate the complexity of their nation as a key aspect of the country's DNA.



## RETREAT

BEACH  
RELAX  
SUN

Example: Maldives



## CULTIVATION

ARTS  
HISTORY  
CULTURE

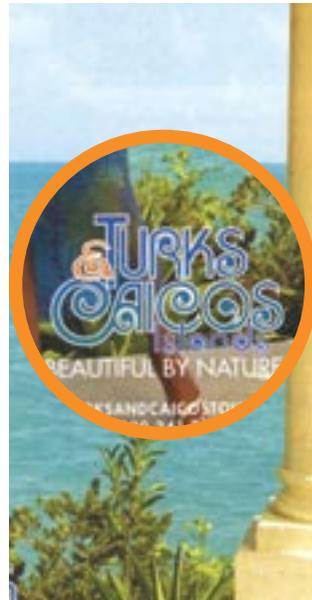
Example: Spain



## CHARACTER

APPROACHABLE  
WELCOMING  
PERSONA

Example: Japan



## PHYSICALITY

BEAUTY  
NATURE  
ENVIRONMENT

Example: Turks & Caicos



## AUTHENTICITY

TIMELESS  
GENUINE  
SPECIAL

Example: México



## RARITY

EXOTIC  
WONDROUS  
SPIRITUAL

Example: India



## DIVERSITY

UNLIMITED  
VARIETY  
RICHNESS

Example: Singapore

# COUNTRY BRAND SEMIOTICS

In addition to country brand typologies, countries also can often speak in distinct voices and use symbolism, syntax and tone to further deliver specific impressions of themselves. If a country brand is not using communications as another tool to differentiate, it is missing a key opportunity to further expound on its value proposition and define itself in a unique way.

Semiotic archetypes of country brands include:

**THRILL SEEKER**

**PARENT**

**INNOVATOR**

**TRUSTED FRIEND**

**TEMPTRESS**

**IRREVERENT ENTERTAINER**

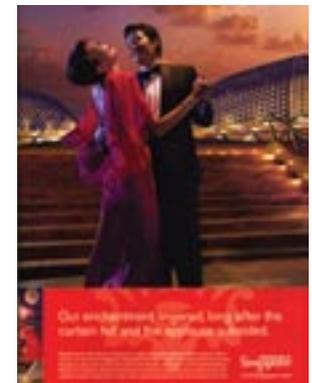
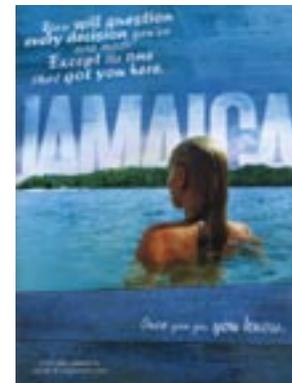
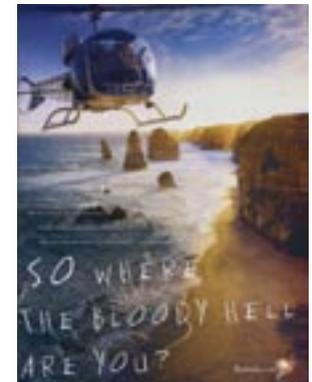
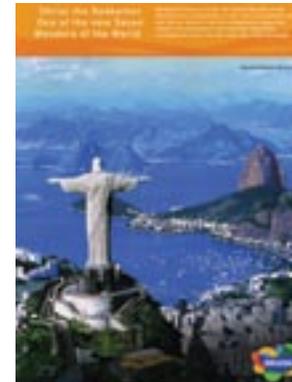
**PERFORMER**

**ENABLER**

**GURU**

**WISH FULFILLER**

**SIMPLIFIER**



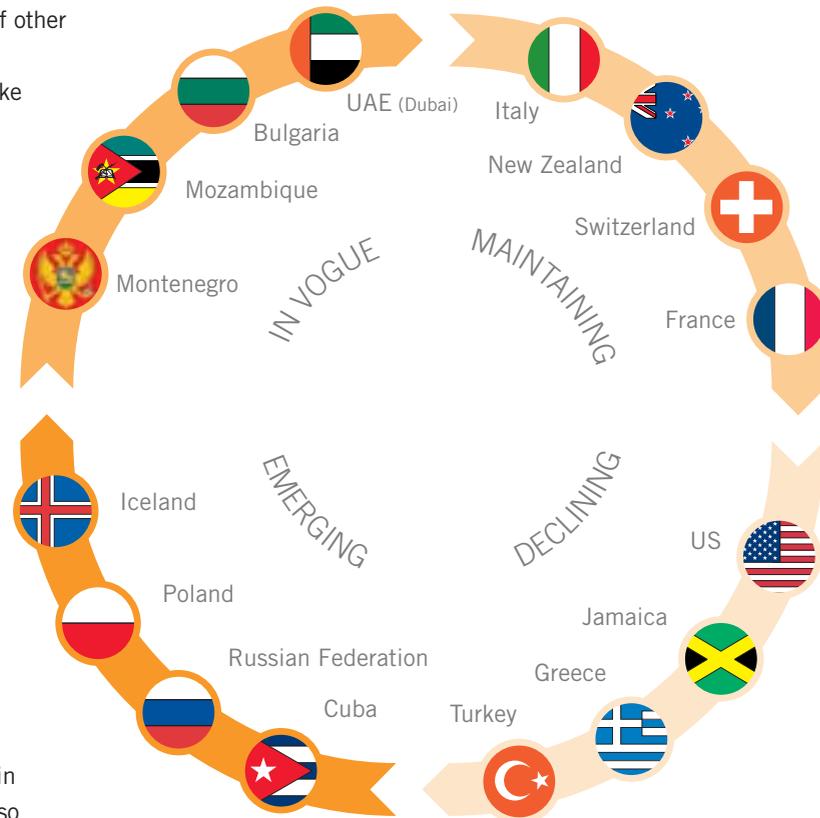
# COUNTRIES IN MOMENTUM

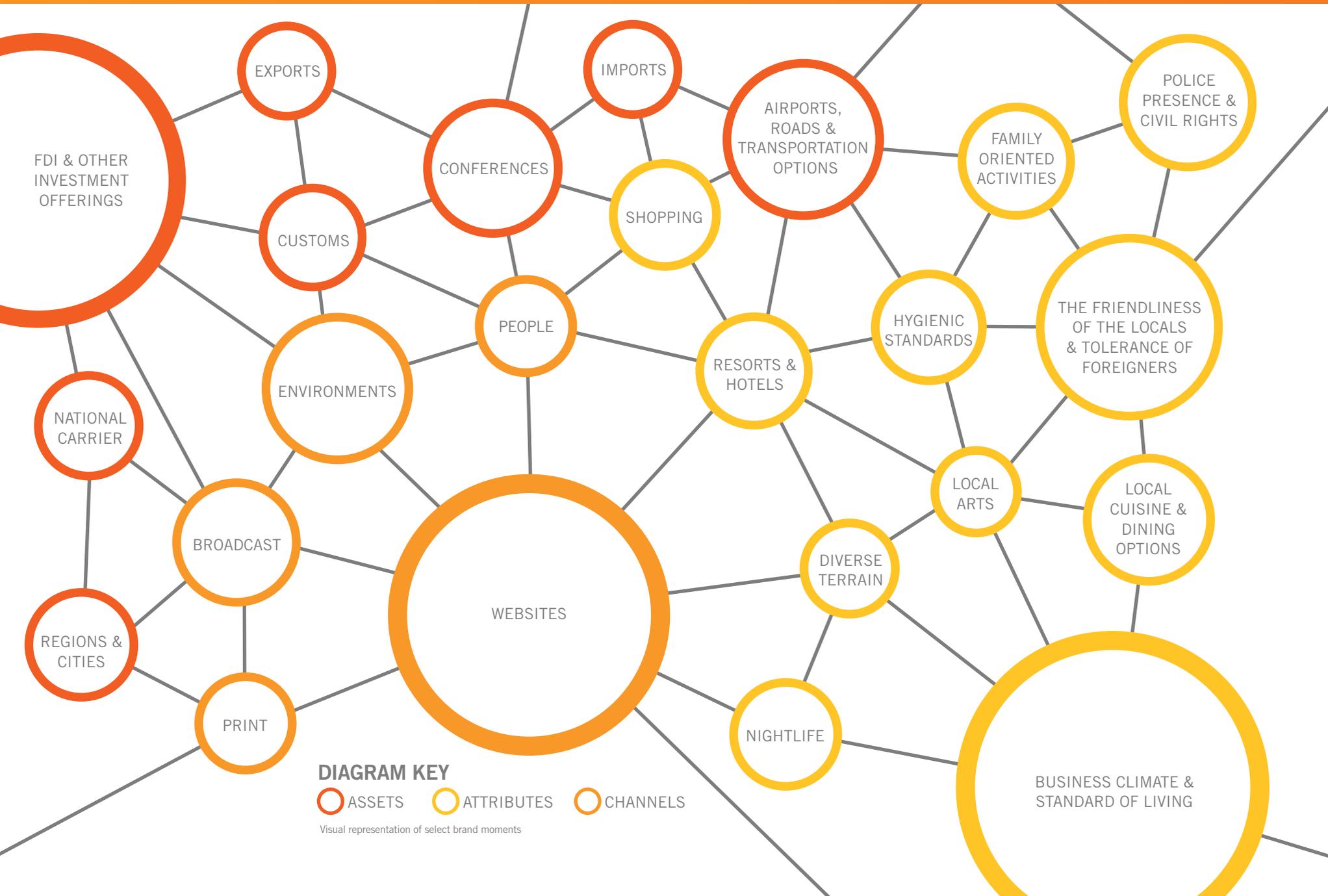
No brand is ever static. It is either improving or declining. Similarly, countries are in constant momentum. Depending on where a country brand is, specific recourse is required to either correct a problem or continue in an area of success. A great country can have a decline in brand value if it is not doing anything to help distinguish it from the mass of other country brands or to communicate the country experience to potential visitors, investors and influencers. Additionally, forces outside of a country's control, like natural disasters or political unrest, can tarnish some country brands.

A strong country brand can equate to higher tourism demand and visitation, a stronger position with regard to global trade and an easier time attracting foreign direct investment. Another benefit of a strong brand is that it can protect a country's brand assets when problems occur.

To determine which country brands stand out as examples in each of the four stages of Momentum, we combined insights and data from our Industry Experts with findings from CBI Global Quantitative research. Key measures include ranking of country brands in decline, most overrated country brand, rising star country brands as well as consideration and preference rankings.

A country brand that enters the Emerging phase typically does so because it has clarified its unique essence and has begun to communicate that essence as a means of attracting the attention of and resonating with audiences. Advancing to In Vogue status entails becoming established enough for people "in the know" to identify with the country brand and to begin advocacy. Sometimes, as is the case with Dubai, a city or region will generate so much interest that it leads its country into In Vogue status. The Maintaining phase is typically a difficult-to-sustain period of stability between the Emerging and Declining phases. Country Brands enter the Declining phase when they fail to effectively leverage their assets or when their actions make them unpopular or unsafe.





## OVERVIEW

Based on WTO travel statistics and a FutureBrand analysis of a country's core experience and communications components, we estimate that countries, on average, have 1.4 million brand moments per day. In other words, a country brand has 1.4 million opportunities each and every day to impact audiences both in country and around the world.

The average country delivers just over 800,000 daily brand moments in country, based on the number of visitors and the substantial opportunities for exposure to the country's assets and attributes. Additionally, the average country conveys 600,000 country-related global messages daily through its various communication channels to attract 10,000+ new visitors each day.

# 1,400,000

## COUNTRY "BRAND MOMENTS" IN A DAY

## IMPLICATIONS

Externally, a country's brand touchpoints – everything from its tourism advertising, country branded exports and national carrier – represent only a part of the marketing messages potential visitors are exposed to. Inside a country, the touchpoint experience becomes immersive and omnipresent. From the condition of the airport, customs and the cost of a cab to the ability to conduct business, traffic and hotel service, every touchpoint communicates something about what the country is (or isn't).

While the breadth of country brand touchpoints may be immeasurable, every touchpoint is not created equal; some stand out in their significance and memorability (the Pyramids of Egypt). These significant touchpoints deliver the country's "moments of truth" – the experiences that drive perceptions of the country brand. Identifying and carefully orchestrating the experience at these touchpoints may be the key to effectively managing a country brand despite its almost overwhelming scope and complexity.

# THE FUTURE OF COUNTRY BRANDED ENVIRONMENTS

Country branding is manifested in many forms. Some countries deploy a range of dynamic devices that deliver a holistic experience, while others constrain their branding to identifiable and accessible applications. Branded environments are one underutilized branding tool that has the potential to unify and define a country brand. The term encompasses all spaces or objects that tangibly represent the country's brand, including information and transportation hubs, trade show exhibitions, tourism bureau offices, country missions and consulates and landmark signage.

In the future, branded environments will be used to provide a consistent and unified experience over the entire visitor journey, from pre-purchase and arrival to departure and post-experience follow-up. Outlined here are two suggestions that could enhance and strengthen a country's profile by elevating its branded environments.

## FOCUS BRAND ATTENTION ON ARRIVAL AND DEPARTURE POINTS

Arrival points, which encompass airports, border crossings and ports, provide visitors with their first real impression of a country. Conversely, when departing, the same points leave travelers with their last real memory of a destination. Airports today are becoming viewed as country beacons, noted for their architectural prominence, user features and modern efficiencies.

Undoubtedly, airports and other arrival points serve a functional purpose. However, the potential of these facilities to serve as compelling branded environments should not be underestimated. Brand cues acknowledging visitor arrival can overlay the built environment. Wayfinding and signage that communicate something about the country brand can be created, while cultural performances, iconic imagery, displays and immersive theaters can easily be added to existing programming. In addition, service personnel, well-versed in the delivery of country brand messages, can be positioned along the arrival journey.

The departure experience is potentially more important than that of arrival. As the last impression visitors take in, it will affect not only how likely they are to return, but whether they will recommend the experience to others. The departure experience should focus on creating lasting memories, by providing facilities where visitors can print photographs or receive a country gift or token "thank you" for visiting, lounges where they can discuss their experiences with fellow travelers and immersive theaters where they can reminisce while waiting for their flight.

## COUNTRY BRAND AS EXPERIENCE CENTER

Over the next decade, strong country brands will build both temporary and permanent brand centers in key overseas locations that will become notable attractions in and of themselves. This trend follows the same pattern established by major global companies, such as Nike (Niketown), Samsung (Samsung Experience) and Sony (Sony Experience).

Similarly, countries will establish “retail” brand environments to showcase their offerings and assets. Imagine “A Little Piece of Italy” with a

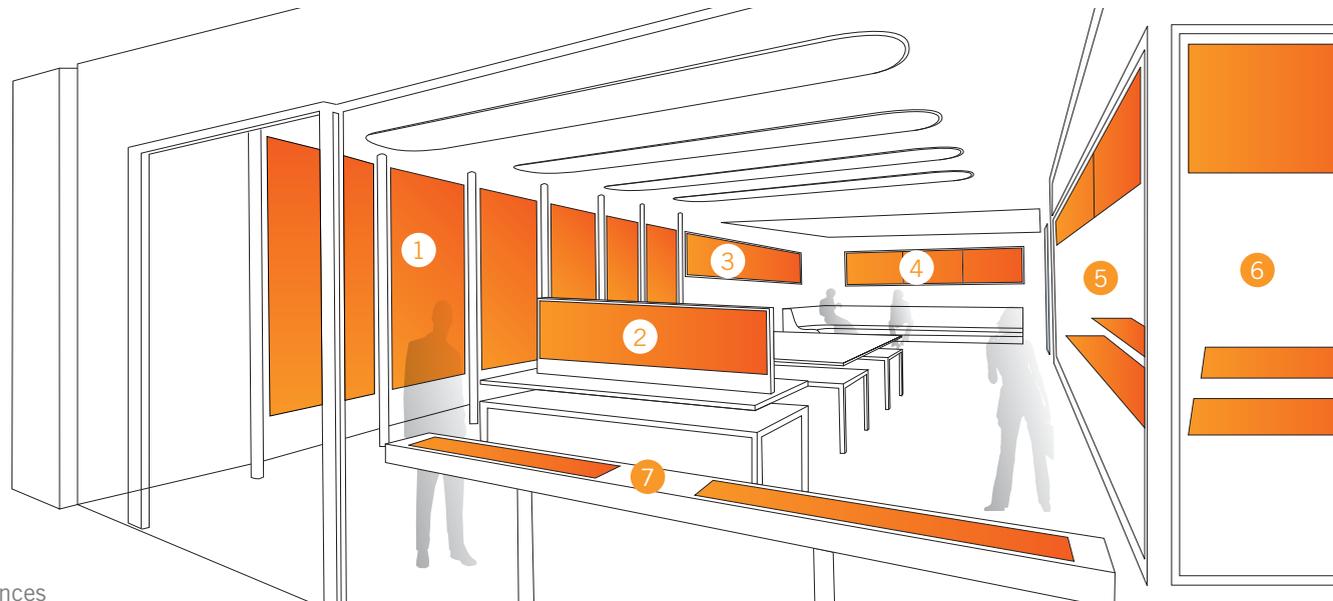
piazza café, gondola ride and the chance to race around Monza in a virtual Ferrari.

These brand centers would be practical, allowing guests to book upcoming accommodations, alter their travel plans and seek expert advice, while also serving as experiential discovery centers for potential visitors, school groups and families. Imagine that, after having booked travel, visitors could receive a unique country-branded pre-arrival welcome kit to further engage and support their journey. They could also be given

a pre-tour of the country, as recreated through the store and virtual environments, and receive a daily richmail counting down the days until their trip. Additionally, the branded center could follow up with visitors post-journey, asking them to recount their favorite locales and country experiences in a video that would be played weekly, as well as inviting them to country celebrations occurring at the center. The country itself could also use the facility to welcome dignitaries and host official functions.

### DIAGRAM KEY

- 1 DIGITAL INTERACTIVE WALL**  
Ask questions of locals
- 2 LIVE DISPLAY**  
Opportunity to sample local produce
- 3 SALES FACILITATION AREA**  
Speak to an expert
- 4 IMMERSIVE THEATER**  
Dive into a multi-sensory experience
- 5 COMMERCIAL ZONE**  
Learn about the benefits of conducting trade
- 6 EDUCATION ZONE**  
Introduce the spirit of the country
- 7 INTERACTIVE STATIONS**  
Listen to local music and view cultural performances



# BRAND USA: A TALE OF TWO COUNTRIES

While the U.S. is ranked number two in the Country Brand Index, as it was last year, many have suggested that the country is an attraction despite itself. Today, it is a paradox of weakness and strength.

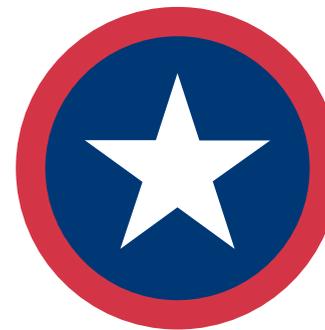
**“BRAND USA IS IN TROUBLE...”  
THE SOLUTION IS “TO  
REDESCRIBE OURSELVES TO  
A WORLD THAT IS UNSURE OF  
OUR VALUES.”**

—Bono

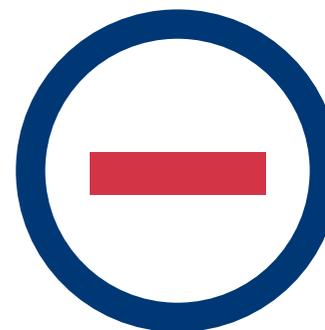
The World Economic Forum in Davos, Switzerland

The United States, home of so many strong regions, cities and attractions has never consistently branded itself. There is no single U.S. country brand logo or core message. Filled with iconic offerings, is the U.S. becoming the brand you love to hate or the brand you hate to love?

## A POWERFUL BRAND



## A COUNTRY IN DECLINE



## THE U.S. IS THE #1 MOST CONSIDERED AND PREFERRED TOURIST DESTINATION IN THE WORLD.

— Country Brand Index  
Global Quantitative Research

### CBI GLOBAL QUANTITATIVE RESEARCH HAS SHOWN:

- The U.S. has the strongest brand associations: #1 in five categories, in the top five in four other categories and in the top 10 in three additional categories.
- The U.S. is the second most visited country in the world, trailing only France.
- The U.S. generates the highest visitor advocacy of any country, beating Italy and France (#s 2 and 3, respectively) by 67%.



**“WE NEED SOMEONE WHO CAN RE-BRAND  
AMERICAN FOREIGN POLICY, RE-BRAND  
DIPLOMACY.”**

— Colin Powell  
Former U.S. Secretary of State

### EXPERT SURVEY FINDINGS HAVE SHOWN:

- The #1 most overrated brand is the U.S.
- The country brand most in decline is the U.S., by a two-to-one margin over the next most declining country brand.
- Lack of country marketing, divisive politics and increasing visitor admittance difficulties are starting to cement an image that is less than heroic.

CAMPAIGN-ORIENTED COUNTRY BRANDS

# GREECE UP CLOSE

Greece is a good example of a country brand that feels very advertising oriented. The campaigns are different year to year, with little apparent synergy or attempt to deepen any established equity. “Explore your senses” is an interesting idea, but it seems superficial. Ads focus only on the sense of sight and the idea does not appear to be extended in a meaningful way. If Greece is about exploring your senses, why not create ads for all five senses, orient the website this way, create materials that engage the senses, etc.?



○ FLAG 

○ TAGLINE  
Explore Your Senses

○ CORE MATERIALS



### CAMPAIGN-ORIENTED COUNTRY BRANDS

# CANADA UP CLOSE

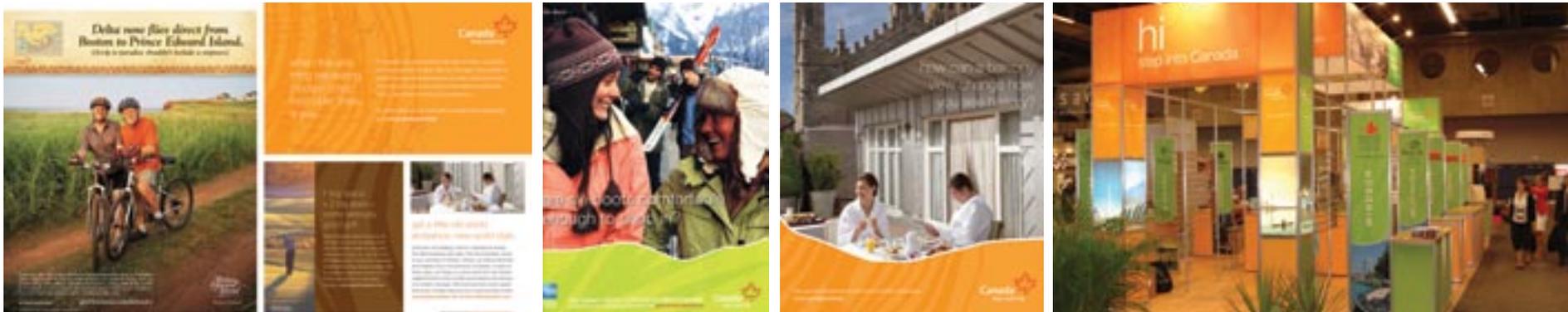
Canada's branding efforts center around "Keep Exploring," which is expressed in an integrated marketing campaign. The tone of the Canada campaign, "it's a little different here," seems reflective of Australia's recent successes; however, Canada does a good job of communicating the richness of exploring with whimsy and humor. The country's tourism site, although unbranded in its tone and messaging, does offer an array of blogs and travel experience options, which is more progressive than the sites of most countries.



○ FLAG 

○ TAGLINE  
Keep Exploring

○ CORE MATERIALS



# DETAILED RANKINGS

In the pages that follow, we consider the countries that stand out as strong and successful brands across a variety of categories. The rankings encompass both qualities that drive consideration and country assets that shape country reputations, perceptions and experiences.

Rankings like “Best Country Brand for History” showcase historical assets and leisure traveler tastes, while those like “Best Country Brand to Extend a Business Trip” reflect business traveler preferences.

New to this year’s rankings are a range of categories, including “Most Environmentally Oriented Country Brand” and “Best Country Brand for Friendly Locals.”

## AUTHENTICITY

Delivering distinctive, genuine and unique cultures and experiences



1. NEW ZEALAND ▲ (2)

New Zealand is careful about preserving the true essence of the country – the unique lifestyle and environment that make it the most authentic travel experience.

- 2. China 
- 3. South Africa ▲ (4) 
- 4. Japan 
- 5. Thailand (5) 
- 6. Egypt ▼ (3) 
- 7. Kenya 
- 8. India ▼ (1) 
- 9. Peru (9) 
- 10. Morocco (10) 

## HISTORY

Proud pasts that are celebrated today by citizens and visitors



### 1. EGYPT

(1)



Home of one of the world's most ancient civilizations, Egypt offers a rich and varied history that remains a must see for every generation.

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

## ART & CULTURE

Architecture, expression, fine and performing arts abound



### 1. ITALY

▲ (2)



From architecture to sculpture, painting and music, you can feel cultural expression everywhere you go in Italy.

|                       |       |  |
|-----------------------|-------|--|
| 2. France             | ▲ (6) |  |
| 3. Egypt              | ▼ (1) |  |
| 4. India              | ▼ (3) |  |
| 5. United Kingdom     | ▲ (7) |  |
| 6. Greece             | ▼ (4) |  |
| 7. China              | ▲ (8) |  |
| 8. Russian Federation |       |  |
| 9. Japan              | ▼ (5) |  |
| 10. Spain             |       |  |

## RESORT/LODGING OPTIONS

Wide variety and superior selection of accommodation options



### 1. UNITED ARAB EMIRATES

▲ (10)



With the largest number of brand new properties, the UAE boasts a wide variety of options – from family-oriented beach resorts to the world's only 7-star hotel.

|                  |       |  |
|------------------|-------|--|
| 2. Maldives      |       |  |
| 3. Australia     | ▲ (9) |  |
| 4. Tahiti        |       |  |
| 5. Canada        | ▼ (3) |  |
| 6. United States | ▼ (1) |  |
| 7. Bahamas       | ▼ (2) |  |
| 8. Singapore     | ▼ (5) |  |
| 9. Bermuda       |       |  |
| 10. Malaysia     |       |  |

## FAMILIES

Providing diverse activities and offerings for families



1. DENMARK

From beautiful gardens and science centers to Legoland and safari parks, Denmark is this year's country leader in family activities and offerings.

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

## OUTDOOR ACTIVITIES/SPORTS

Best conditions, terrain and topography for land or water sports



1. AUSTRALIA

▲ (2)

In Australia, you can explore the Outback, snorkel the Great Barrier Reef, climb the Blue Mountains, surf the Gold Coast, kayak in Tasmania...and more.

- 2. New Zealand ▼ (1)
- 3. Canada ▲ (9)
- 4. South Africa ▲ (8)
- 5. United States ▲ (6)
- 6. Jamaica ▲ (7)
- 7. Bahamas ▼ (4)
- 8. Tahiti
- 9. Belize
- 10. Austria

## BEACH

Pristine beaches, from remote to mainstream



1. MALDIVES

▲ (2)

Surrounded by the Indian Ocean, Maldives is rich in white tranquil beaches that are rated as the most beautiful in the world.

- 2. Tahiti
- 3. Bahamas ▼ (1)
- 4. Australia ▲ (6)
- 5. Dominican Republic ▲ (8)
- 6. Jamaica ▲ (7)
- 7. Aruba
- 8. Bermuda
- 9. México
- 10. Fiji ▼ (3)

## NATURAL BEAUTY

Striking topography and physical assets



1. NEW ZEALAND (1)

New Zealand's glaciers, gold towns, rainforest and wild beaches are just some of its assets of natural beauty.

- 2. Australia ▲ (7)
- 3. Maldives ▲ (4)
- 4. Canada ▲ (8)
- 5. South Africa (5)
- 6. Switzerland ▼ (2)
- 7. Iceland
- 8. Fiji ▲ (9)
- 9. Ireland
- 10. Kenya ▼ (6)

## ENVIRONMENTAL

Most oriented toward environmental protection



1. SWEDEN

"Environmental Sweden" is a comprehensive plan to solve all major environmental problems for the next generation of Swedes.

- 2. New Zealand
- 3. Singapore
- 4. Iceland
- 5. Switzerland
- 6. Denmark
- 7. Canada
- 8. Germany
- 9. Austria
- 10. Costa Rica

## REST & RELAXATION

The ideal array of rejuvenation and tranquil activities



1. MALDIVES (1)

A key approach that keeps Maldives at the top of the rest and relaxation list is the "one island-one resort concept," which provides as much privacy as you can handle.

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

## SAFETY

Considered most stable and secure



1. NEW ZEALAND

▲ (3)



With lower crime rates and a stable government, New Zealand is rated the safest country this year.

- 2. Canada ▼ (1)
- 3. Sweden ▲ (8)
- 4. Denmark ▲ (5)
- 5. Switzerland ▼ (2)
- 6. Australia (6)
- 7. Austria ▼ (4)
- 8. Ireland
- 9. Netherlands
- 10. Singapore ▼ (7)

## RISING STAR

Seen as on their way to becoming major destinations



1. CROATIA

▲ (2)



As home to some of Europe's finest Roman ruins as well as a string of coastal and island resorts, Croatia is now drawing flocks of travelers, making the country a rising star.

- 2. China ▼ (1)
- 3. United Arab Emirates (3)
- 4. Vietnam ▲ (7)
- 5. South Africa ▼ (4)
- 6. Cuba
- 7. Iceland
- 8. Poland
- 9. Russian Federation
- 10. Argentina ▼ (5)

## VALUE FOR MONEY

Offering the most in return for the price you pay



1. THAILAND

(1)



As one of the most affordable destinations in the world, with an authentic culture, excellent beaches and world-class nightlife, Thailand provides the most for your money.

- 2. Hungary ▲ (10)
- 3. Czech Republic
- 4. México
- 5. Vietnam ▲ (7)
- 6. Philippines
- 7. Turkey ▼ (4)
- 8. Egypt
- 9. Indonesia ▼ (2)
- 10. India ▼ (6)

## FINE DINING

Superior culinary experiences and offerings



### 1. FRANCE



France is the original home of gourmet and fine dining with a wide variety of regional cuisines to choose from.

- 2. Italy 
- 3. Singapore 
- 4. Japan 
- 5. United States 
- 6. United Kingdom 
- 7. United Arab Emirates 
- 8. Malaysia 
- 9. Spain 
- 10. Argentina 

## SHOPPING

Accessible, diverse and abundant retail choices



### 1. UNITED STATES

(1)



The United States offers the broadest array of shopping options for travelers all over the world.

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

## NIGHTLIFE

Noteworthy bar, nightclub and late night scene



### 1. SPAIN



Spain's nightlife is a way of life, with locals and visitors flocking to explore countless after hours options.

- 2. United States 
- 3. Brazil 
- 4. Thailand 
- 5. Singapore 
- 6. Australia 
- 7. United Kingdom 
- 8. México 
- 9. Italy 
- 10. Japan 

## FRIENDLY LOCALS

Welcoming citizens that make visitors feel comfortable



### 1. AUSTRALIA



The warmth and hospitality of Australia's locals definitely help make Australia the popular attraction it is today.

- 2. Canada 
- 3. New Zealand 
- 4. Ireland 
- 5. Thailand 
- 6. Sweden 
- 7. Fiji 
- 8. Turkey 
- 9. Aruba 
- 10. Austria 

## MOST LIKE TO LIVE IN

Where people would choose to live, outside their home country



### 1. CANADA



With a combination of a stable government, friendly people and a good economic environment, Canada is where people want to live.

- 2. New Zealand 
- 3. Australia 
- 4. Sweden 
- 5. Singapore 
- 6. United States 
- 7. United Kingdom 
- 8. Switzerland 
- 9. Costa Rica 
- 10. Italy 

## IDEAL FOR BUSINESS

Considered best to do business in or with



### 1. UNITED STATES



The United States has the largest and most diversified economy, providing the ideal environment for business.

- 2. China  ▲ (5)
- 3. United Kingdom  ▲ (9)
- 4. France  ▼ (3)
- 5. Italy 
- 6. Australia  (6)
- 7. Singapore  ▲ (10)
- 8. Japan  ▼ (7)
- 9. Ireland 
- 10. United Arab Emirates 

## EASIEST TO DO BUSINESS IN

Welcoming and facilitating business culture



1. UNITED STATES

(1)



With established legal protections and business accommodations, the United States is open to all languages, cultures and business opportunities.

- 2. United Kingdom ▲ (4)
- 3. Canada ▼ (2)
- 4. Ireland
- 5. France
- 6. Switzerland ▲ (10)
- 7. Germany ▼ (6)
- 8. Australia ▼ (3)
- 9. Singapore ▼ (5)
- 10. China ▼ (7)

## EXTEND A BUSINESS TRIP

Where travelers want to extend business travel into personal vacation



1. UNITED STATES

(1)



Not only a leading business destination, the United States provides professional audiences with a wide variety of great vacation attractions.

- 2. Australia (2)
- 3. Italy ▲ (4)
- 4. Japan ▲ (8)
- 5. Thailand
- 6. France ▼ (3)
- 7. Canada (7)
- 8. New Zealand
- 9. Switzerland
- 10. China ▼ (6)

## CONFERENCES

Preferred off-site/convention destination



1. UNITED STATES

(1)



The United States offers the most extensive array of accommodations for conferences, conventions and off-site meetings.

- 2. Switzerland ▲ (8)
- 3. Germany ▲ (6)
- 4. Singapore ▼ (3)
- 5. United Arab Emirates ▲ (9)
- 6. Japan
- 7. France ▼ (2)
- 8. Canada ▼ (4)
- 9. China ▼ (5)
- 10. Ireland

# CATEGORY WINNERS

- = Led in category
- = Ranked in category

|                                | ARGENTINA | ARUBA | AUSTRALIA | AUSTRIA | BAHAMAS | BELIZE | BERMUDA | BRAZIL | CANADA | CHINA | COSTA RICA | CROATIA | CUBA | CZECH REPUBLIC | DENMARK | DOMINICAN REPUBLIC | EGYPT |
|--------------------------------|-----------|-------|-----------|---------|---------|--------|---------|--------|--------|-------|------------|---------|------|----------------|---------|--------------------|-------|
| Number of Categories in Top 10 | (2)       | (4)   | (14)      | (5)     | (4)     | (1)    | (3)     | (1)    | (14)   | (8)   | (2)        | (1)     | (1)  | (1)            | (3)     | (1)                | (4)   |
| Top Country Brands             |           |       | 1         |         |         |        |         |        | 6      |       |            |         |      |                |         |                    |       |
| Authenticity                   |           |       |           |         |         |        |         |        |        | 2     |            |         |      |                |         |                    | 6     |
| History                        |           |       |           |         |         |        |         |        |        | 3     |            |         |      |                |         |                    | 1     |
| Art & Culture                  |           |       |           |         |         |        |         |        |        | 7     |            |         |      |                |         |                    | 3     |
| Resort/Lodging Options         |           |       | 3         |         | 7       |        | 9       |        | 5      |       |            |         |      |                |         |                    |       |
| Families                       |           | 10    | 3         | 6       |         |        |         |        | 2      |       |            |         |      |                | 1       |                    |       |
| Outdoor Activities/Sports      |           |       | 1         | 10      | 7       | 9      |         |        | 3      |       |            |         |      |                |         |                    |       |
| Beach                          |           | 7     | 4         |         | 3       |        | 8       |        |        |       |            |         |      |                |         | 5                  |       |
| Natural Beauty                 |           |       | 2         |         |         |        |         |        | 4      |       |            |         |      |                |         |                    |       |
| Environmental                  |           |       |           | 9       |         |        |         |        | 7      |       | 10         |         |      |                | 6       |                    |       |
| Rest & Relaxation              |           | 7     | 8         |         | 3       |        | 9       |        | 10     |       |            |         |      |                |         |                    |       |
| Safety                         |           |       | 6         | 7       |         |        |         |        | 2      |       |            |         |      |                | 4       |                    |       |
| Rising Star                    | 10        |       |           |         |         |        |         |        |        | 2     |            | 1       | 6    |                |         |                    |       |
| Value for Money                |           |       |           |         |         |        |         |        |        |       |            |         |      | 3              |         |                    | 8     |
| Fine Dining                    | 10        |       |           |         |         |        |         |        |        |       |            |         |      |                |         |                    |       |
| Shopping                       |           |       |           |         |         |        |         |        | 8      |       |            |         |      |                |         |                    |       |
| Nightlife                      |           |       | 6         |         |         |        |         | 3      |        |       |            |         |      |                |         |                    |       |
| Friendly Locals                |           | 9     | 1         | 10      |         |        |         |        | 2      |       |            |         |      |                |         |                    |       |
| Most Like To Live In           |           |       | 3         |         |         |        |         |        | 1      |       | 9          |         |      |                |         |                    |       |
| Ideal For Business             |           |       | 6         |         |         |        |         |        |        | 2     |            |         |      |                |         |                    |       |
| Easiest To Do Business In      |           |       | 8         |         |         |        |         |        | 3      | 10    |            |         |      |                |         |                    |       |
| Extend A Business Trip         |           |       | 2         |         |         |        |         |        | 7      | 10    |            |         |      |                |         |                    |       |
| Conferences                    |           |       |           |         |         |        |         |        | 8      | 9     |            |         |      |                |         |                    |       |

|  | FIJI | FRANCE | GERMANY | GREECE | HUNGARY | ICELAND | INDIA | INDONESIA | IRELAND | ISRAEL | ITALY | JAMAICA | JAPAN | KENYA | MALAYSIA | MALDIVES | MÉXICO | MOROCCO | NETHERLANDS | NEW ZEALAND | PERU | PHILIPPINES | POLAND | RUSSIAN FEDERATION | SINGAPORE | SOUTH AFRICA | SOUTH KOREA | SPAIN | SWEDEN | SWITZERLAND | TAHITI | THAILAND | TURKEY | UNITED ARAB EMIRATES | UNITED KINGDOM | UNITED STATES | VIETNAM |  |
|--|------|--------|---------|--------|---------|---------|-------|-----------|---------|--------|-------|---------|-------|-------|----------|----------|--------|---------|-------------|-------------|------|-------------|--------|--------------------|-----------|--------------|-------------|-------|--------|-------------|--------|----------|--------|----------------------|----------------|---------------|---------|--|
|  | (4)  | (9)    | (3)     | (3)    | (1)     | (3)     | (4)   | (1)       | (7)     | (1)    | (10)  | (3)     | (9)   | (2)   | (2)      | (4)      | (3)    | (1)     | (1)         | (11)        | (2)  | (1)         | (1)    | (3)                | (10)      | (4)          | (1)         | (4)   | (5)    | (7)         | (4)    | (6)      | (2)    | (6)                  | (9)            | (12)          | (2)     |  |
|  |      | 4      |         | 9      |         |         |       |           |         |        | 5     |         | 10    |       |          |          |        |         | 8           |             |      |             |        |                    |           |              | 7           |       |        |             |        |          |        | 3                    | 2              |               |         |  |
|  |      |        |         |        |         |         | 8     |           |         |        |       |         | 4     | 7     |          |          |        | 10      |             | 1           | 9    |             |        |                    |           | 3            |             |       |        |             |        | 5        |        |                      |                |               |         |  |
|  |      | 5      |         | 4      |         |         | 8     |           |         | 10     | 2     |         |       |       |          |          |        |         |             |             | 9    |             |        |                    | 7         |              |             |       |        |             |        |          |        |                      | 6              |               |         |  |
|  |      | 2      |         | 6      |         |         | 4     |           |         |        | 1     |         | 9     |       |          |          |        |         |             |             |      |             |        | 8                  |           |              |             | 10    |        |             |        |          |        |                      | 5              |               |         |  |
|  |      |        |         |        |         |         |       |           | 8       |        | 9     |         |       |       | 10       | 2        |        |         |             |             |      |             |        |                    | 8         |              |             |       |        |             | 4      |          |        | 1                    |                | 6             |         |  |
|  |      |        |         |        |         |         |       |           |         | 9      |       | 6       |       |       |          |          |        |         |             |             | 7    |             |        |                    |           |              |             |       | 5      |             |        |          |        |                      | 4              |               |         |  |
|  | 10   |        |         |        |         |         |       |           |         |        |       | 6       |       |       |          |          |        |         |             | 2           |      |             |        |                    |           | 4            |             |       |        |             |        |          |        |                      |                | 5             |         |  |
|  | 8    |        |         |        |         | 7       |       |           | 9       |        |       | 6       |       | 10    |          | 3        | 9      |         |             | 1           |      |             |        |                    |           | 5            |             |       |        | 6           |        |          |        |                      |                | 4             |         |  |
|  |      |        | 8       |        |         | 4       |       |           |         |        |       |         |       |       |          |          |        |         |             | 2           |      |             |        |                    |           |              |             | 1     |        | 5           |        |          |        |                      |                | 5             |         |  |
|  | 6    |        |         |        |         |         |       |           |         |        |       | 4       |       |       |          | 1        |        |         |             | 5           |      |             |        |                    | 3         |              |             |       | 1      |             | 2      |          |        |                      |                |               |         |  |
|  |      |        |         |        |         |         |       |           | 8       |        |       |         |       |       |          |          |        |         | 9           | 1           |      |             |        |                    | 10        |              |             | 3     | 5      |             |        |          |        |                      |                |               | 4       |  |
|  |      |        |         |        | 2       |         | 10    | 9         |         |        |       |         |       |       |          |          | 4      |         |             |             |      | 6           |        | 8                  |           |              |             |       |        |             |        | 1        | 7      |                      | 3              |               | 5       |  |
|  |      | 1      |         |        |         |         |       |           |         |        | 2     |         | 4     |       | 8        |          |        |         |             |             |      |             |        |                    |           | 3            |             | 9     |        |             |        |          |        | 7                    | 6              |               |         |  |
|  |      | 6      |         |        |         |         |       |           |         |        | 4     |         | 5     |       |          |          |        |         |             |             |      |             |        |                    |           | 3            |             |       |        |             |        |          | 2      | 7                    | 1              |               |         |  |
|  |      |        |         |        |         |         |       |           |         |        | 9     |         | 10    |       |          |          | 8      |         |             |             |      |             |        |                    |           | 5            |             | 1     |        |             |        |          |        |                      | 7              | 2             |         |  |
|  | 7    |        |         |        |         |         |       |           | 4       |        |       |         |       |       |          |          |        |         |             | 3           |      |             |        |                    |           |              |             |       | 6      |             |        |          |        |                      |                | 7             | 6       |  |
|  |      | 4      |         |        |         |         |       |           |         |        | 10    |         |       |       |          |          |        |         |             | 2           |      |             |        |                    |           | 5            |             |       | 4      | 8           |        |          |        |                      | 7              | 6             |         |  |
|  |      |        |         |        |         |         |       |           |         |        |       |         |       |       |          |          |        |         |             |             |      |             |        |                    |           |              |             |       |        |             |        |          |        | 10                   | 3              | 1             |         |  |
|  |      | 5      | 7       |        |         |         |       |           |         |        |       |         |       |       |          |          |        |         |             |             |      |             |        |                    |           | 9            |             |       |        |             |        |          |        | 2                    | 1              |               |         |  |
|  |      | 6      |         |        |         |         |       |           |         |        | 3     |         | 4     |       |          |          |        |         |             |             |      |             |        |                    |           |              |             |       |        |             |        |          |        |                      | 7              | 1             |         |  |
|  |      | 7      | 3       |        |         |         |       |           | 10      |        |       |         |       |       |          |          |        |         |             | 8           |      |             |        |                    |           |              |             |       |        |             |        |          |        |                      | 1              |               |         |  |

# COUNTRY BRAND ADVICE



## FROM A PR PERSPECTIVE

1. Do not think of tourism in terms of arrivals. Think of visitors as the ultimate export product of your nation. They are mediums in and of themselves, and they comprise the most powerful of all communication and influencer tools: word of mouth. In addition to welcoming them to your borders, embrace, communicate and engage them in conversation as they leave.
2. Consider creating a “National Brand Manager,” a high-level liaison in government who can mobilize other departments, organizations and the private sector to improve the overall country experience.
3. The importance of public relations to drive and provide legitimate content in today’s world of “new and social media” is critical. Are you providing PR with enough voice, influence and budget to help lead the marketing process?
4. Countries that break through the clutter take calculated risks. A great idea, concept or strategy is meaningless unless it is put into action. Make decisions and take action.

## FutureBrand



## FROM A BRANDING PERSPECTIVE

1. Fix the right problem. Not all country brands are created equal, nor are there one-size-fits-all solutions. Determine what your key challenges are and strive to correct those.
2. Think long term. Changing perceptions and building loyalty inside a country and out takes time, focus and commitment. Create a long-term activation plan and focus three to five years out.
3. Embrace complexity. Countries are a rich assortment of assets and opportunities. Figure out a way to communicate the variety in a focused way.
4. Think as a brand. Brands are about promise and performance, and about creating relationships between customer and product. How are you deepening this and ensuring that the experience of your country is being delivered as a compelling brand?
5. Act as one country. Leverage the power of existing regions, ministries and attractions. Cross-sell country equities and link/synergize all elements to build and benefit the country brand.

## KEY CONTACT

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

Rina Plapler  
 rplapler@futurebrand.com  
 +1 212 931 6443

## METHODOLOGY

FutureBrand has developed a three-tiered evaluation system for ranking country brands. The Index incorporates global quantitative research, expert opinions and relevant statistics that link brand equity to assets, growth and expansion. More than 2,600 respondents from seven countries participated in a travel survey. Participants were screened to include frequent international travelers (who travel internationally more than once a year) between the ages of 21 and 65, with a balanced split between men and women. Business and leisure travelers were both included. Survey results were aggregated and weighted in proportion to their regions' respective volume of travel consumption. Performance on attributes by country was then considered against the expert opinions of more than 50 international travel industry professionals and secondary statistics in order to generate the country rankings.

## ACKNOWLEDGEMENT

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**WEBER SHANDWICK**  
 W O R L D W I D E

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