Country Brand Index 2014-15
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1. Introduction
Introduction

The value of measuring countries as brands

The Country Brand Index has historically studied perceptions of 118 countries around the world in the same way we measure consumer or corporate brands – ranking them according to strength of perception across association dimensions.

FutureBrand was among the pioneers of this approach, exploring the hypothesis that countries can usefully be understood as the sum of their identity and reputation. And, just like brands, strength or weakness of perception of a country can influence peoples’ decisions to choose them as places to visit, live or invest in. This was assumed to provide a competitive advantage in a global market for tourism, education and investment, and built evidence for proactive country brand management.

Over the last 5 years, our work in country branding has highlighted the increasing importance of ‘country of origin’ in understanding country brand strength. In particular, its role as a driver of consumer choice became evident in our Made In research in 2013-14. This is not least because strong brands associated with a country make a significant contribution to perceptions of it, but also because people actively prefer products and services when they are from specific countries. Which means every time they buy a car, eat a type of food or wear a clothing brand, they can be consciously consuming an aspect of the country that made them. Countries that do not benefit from these ‘Made In’ associations are at a measurable disadvantage to their peers.

Not just that, but we are increasingly interested in the relationship between perception strength and behaviour when it comes to country brand measurement. In other words, can we prove that strong perceptions lead to decisions to visit, recommend and do business with a country?

Finally, the nature of our study has always implied that countries with stronger perceptions and higher rank position are also ‘stronger’ country brands, but that all countries qualify as brands by default. But, we have yet to explore the idea of a minimum threshold of perception strength determining the difference between a country and a ‘country brand’.

“Countries can usefully be understood as the sum of their identity and reputation.”
How is the 2014 report different?

This year, we set out to test an emerging hypothesis that not all countries qualify as “brands.” But when they do, they have a measurable competitive advantage over their peer countries.

With this in mind, we evolved our approach to the research in two significant ways:

1. We measured attributes relating to ‘country of origin’ as an additional dimension of country brand strength.
2. We increased the focus on specific measures relating to decisions to visit, invest in and recommend a country.

In addition to previous years, we also gathered data on cities to understand the relationship between country brand strength and city perception around the world, not least because of the growing urbanization of both developed and developing countries.

What did we find out?

The results of this year’s research are striking. First of all, of the 75 countries included in our survey, only 22 qualify as ‘country brands’ by our measures. By this, we mean that people have stronger than average perceptions of the country across our six dimensions relating to ‘status’ and ‘experience’. In other words, they perceive it equally strongly in aspects relating to quality of life, values and business, as they do for its culture, history, tourism and ‘Made In’ expertise.

Importantly, we also discovered that when people rate a country as a “brand” they are also more likely to visit, recommend and do business with it than the other countries in the ranking, demonstrating that being seen as a country brand provides a tangible competitive advantage. Not just that, but our respondents also have more confidence in and feel closer to country brands compared to countries in the study.

Critically, the main drivers of a ‘country brand’ are perceptions of making products of high quality, wanting to live or study there and infrastructure, all of which reinforce the idea that to qualify as a ‘country brand’, people need to want to consume your products and services and prefer you as a place to live and learn.

Who will benefit from this report?

If you are a country brand manager or work in tourism, trade and investment at a national or international level, the Country Brand Index offers valuable insights into the levers you can pull for competitive advantage. It will also be of use to professional brand managers and leaders seeking to, or already harnessing, ‘country of origin’ associations for corporate and consumer brands.
2. Our methodology
Our methodology

Our research approach

This year’s fieldwork was designed to test the hypothesis that not all countries qualify as ‘brands’, but when they do, they have a measurable competitive advantage. To do this, we have developed our core country brand strength model, including the addition of a new association dimension, and combined quantitative and qualitative methods to understand global perception.

Quantitative Research

FutureBrand collected quantitative and qualitative data from 2,530 opinion-formers and frequent international business or leisure travelers in 17 countries (USA, Canada, Brazil, Argentina, Mexico, UK, Germany, France, Russia, Turkey, South Africa, UAE, India, China, Thailand, Japan and Australia).

The questionnaire was developed around our proprietary Hierarchical Decision Model (HDM) to understand how strongly audiences perceive countries from levels of Awareness to Advocacy. The HDM takes seven areas into consideration: Awareness, Familiarity, Preference, Associations, Consideration, Decision/Visitation and Advocacy. For the purpose of ranking, the research weighs in favor of Associations across six dimensions and their related attributes — from Value System to ‘Made In’.

This year, we have added a new ‘Made In’ dimension and rationalized our existing measures as part of improvements to the methodology. Please see the Appendix for a full breakdown of how our measurements have changed, including updates to the association dimensions and attributes.

New brand typologies for 2014-15

In addition to an evolved research methodology, the 2014-15 report offers a new classification approach to help define countries according to perception strength. These are designed to clarify the current position of each country relative to its peers and map their distribution across one of four discrete typologies:

• “Countries” — Countries that have below average perceptions in both the Status and Experience dimensions.

• “Status countries” — Countries whose perception strength is biased towards attributes relating to Value System, Quality Of Life and Business Potential.

• “Experience countries” — Countries whose perception strength is biased towards dimensions relating to Heritage & Culture, Tourism and Made In.

• “Country brands” — Countries that have above average perceptions across both the Status and Experience dimensions and have measurable competitive advantages over their peers as a result.
Our research approach

QualiQuant™ sample criteria

As in previous years, our global research sample of 2,530 respondents was selected according to the following screening criteria:

- Aware of and familiar with all the countries covered.
- Interested in travel abroad.
- Have travelled internationally at least once in the last year, mix of business and/or leisure.
- 21-65 years old.
- Balanced between male and female.

Expert insight

In addition to our quantitative and qualitative fieldwork, we drew on the expertise and insight of FutureBrand practitioners in Europe, the Americas and Asia to inform the future focus section of this year’s report. We supplemented this with external expert advice. Special thanks go to Ian Kirk in London, Enshalla Anderson in New York, Gustavo Koniszczcer in Buenos Aires, Dan Dimmock in Singapore and Dr Pawel Surowiec from the University of Bournemouth.

QRi Consulting – our independent research partner

QRi Consulting is FutureBrand’s independent global research partner for the Country Brand Index. Working in close collaboration, QRi helped to define the research approach against FutureBrand’s initial hypothesis, as well as managing recruitment, questionnaire development, and providing in-depth analysis of the qualitative and quantitative data underpinning the report. This is informed by QRi’s extensive research, country brand and sector knowledge and experience as well as their proprietary QualiQuant™ methodologies.
### HIERARCHICAL DECISION MODEL (HDM)

FutureBrand’s proprietary model for determining how key audiences perceive a country’s brand.

**Awareness**
How well do people know the country and its offerings?

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

**Associations**
How highly do audiences esteem the country? Does it resonate?

**Preference**
Is the country considered for a visit? What about for investment, to acquire or consume its products?

**Consideration**
To what extent do people follow through and visit the country or establish a commercial relationship?

**Decision/Visitation**
Do visitors recommend the country to family, friends and colleagues?

### Association dimensions

#### STATUS

<table>
<thead>
<tr>
<th>VALUE SYSTEM</th>
<th>QUALITY OF LIFE</th>
<th>BUSINESS POTENTIAL</th>
<th>HERITAGE &amp; CULTURE</th>
<th>TOURISM</th>
<th>MADE IN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Political freedom</td>
<td>Health &amp; education</td>
<td>Good for business</td>
<td>Historical points of interest</td>
<td>Value for money</td>
<td>Make products that are authentic</td>
</tr>
<tr>
<td>Environmental standards</td>
<td>Standard of living</td>
<td>Advanced technology</td>
<td>Heritage, art &amp; culture</td>
<td>Range of attractions</td>
<td>Make products of high quality</td>
</tr>
<tr>
<td>Tolerance</td>
<td>Safety &amp; security</td>
<td>Good infrastructure</td>
<td>Natural beauty</td>
<td>Resort &amp; lodging options</td>
<td>They create unique products</td>
</tr>
<tr>
<td></td>
<td>Would like to live/study there</td>
<td></td>
<td></td>
<td>Would like to visit for a vacation</td>
<td>Would like to buy products made in that country</td>
</tr>
</tbody>
</table>

#### EXPERIENCE

- **Value System**
  - Political freedom
  - Environmental standards
  - Tolerance

- **Quality of Life**
  - Health & education
  - Standard of living
  - Safety & security

- **Business Potential**
  - Good for business
  - Advanced technology
  - Good infrastructure

- **Heritage & Culture**
  - Historical points of interest
  - Heritage, art & culture
  - Natural beauty

- **Tourism**
  - Range of attractions
  - Resort & lodging options
  - Would like to visit for a vacation

- **Made In**
  - Value for money
  - Make products that are authentic
  - Make products of high quality
  - They create unique products
  - Would like to buy products made in that country

**Country Brand Index 2014-15**
3. 2014-15 rankings
Top 20 countries

1. Japan
2. Switzerland
3. Germany
4. Sweden
5. Canada
6. Norway
7. United States
8. Australia
9. Denmark
10. Austria
11. New Zealand
12. United Kingdom
13. Finland
14. Singapore
15. Iceland
16. Netherlands
17. France
18. Italy
19. United Arab Emirates
20. South Korea
2014-15 rankings

Japan
It is a unique country, not just for making deals, but also culturally speaking. Being in Japan is unique.

Respondent opinion on Japan

It’s a country that is improving and not standing still; it is surpassing the whole world in robotic technologies and engineering.

Respondent opinion on Japan
Japan - Summary of perceptions

What are the perceptions of ‘Made in Japan’?

- Makes unique products
- Makes products of high quality
- Would like to buy products made in that country
- Makes products that are authentic

Where does Japan have most momentum?

- Technology & Innovation
- Political & Economic Influence
- Sustainability & Environmental Friendliness
- Cultural Significance

What brands do people associate with Japan?

- Nintendo
- Sony
- Toshiba
- Toyota
- Panasonic
- Hitachi
- Honda

What is Japan most expert at?

- Transportation
- Technology
- Retail
- Personal & Household Care
- Media
- Luxury
- Internet Services
- Household Appliances
- Food & Beverage
- Financial Services
- Fashion
- Energy
- Consumer Electronics
- Automotive
- Alcohol

Country Brand Index 2014-15 FutureBrand ©
Highly efficient transportation, business acumen, banking industry, gorgeous scenery, high standard of living, warm people.

Respondent opinion on Switzerland

It’s a very stable economy with political freedom and has good nature and high quality of life.

Respondent opinion on Switzerland

What words do people use to describe Switzerland?

Country Brand Index 2014-15
Switzerland - Summary of perceptions

What are the perceptions of 'Made in Switzerland'?
- Makes products that are authentic
- Makes products of high quality
- They create unique products

Where does Switzerland have most momentum?
- Technology & Innovation
- Political & Economic Influence
- Sustainability & Environmental Friendliness
- Cultural Significance

What is Switzerland most expert at?
- Transportation
- Technology
- Retail
- Personal & Household Care
- Media
- Luxury
- Internet Services
- Household Appliances
- Food & Beverage
- Financial Services
- Fashion
- Energy
- Automotive
- Consumer Electronics
- Alcohol

Country expertise average
- Country Brand Index 2014-15

What brands do people associate with Switzerland?
- Rolex
- Swatch
- Toblerone
- Nestlé
- TAG Heuer
- Patek Philippe
- Tissot

FutureBrand ©
Germany
It sustains the European Economic zone and as a consequence, all of Europe. And also because after the devastating second world war, it has to reinvent itself and in few years it positioned itself as the indisputable worldwide leader.

Respondent opinion on Germany

According to what I have as a reference, Germany is a country that has the virtues to choose from. Developed, organized, safe, public health is looked after very carefully, education, low levels of or virtually no poverty.

Respondent opinion on Germany
Germany - Summary of perceptions

What are the perceptions of ‘Made in Germany’?

- Makes products that are authentic
- Makes products of high quality
- They create unique products
- Would like to buy products made in that country

Where does Germany have most momentum?

- Technology & Innovation
- Political & Economic Influence
- Sustainability & Environmental Friendliness
- Cultural Significance

What brands do people associate with Germany?

- Mercedes-Benz
- Bayer
- Volkswagen
- Lufthansa
- Audi
- Siemens
- Porsche
- BMW
- adidas

What is Germany most expert at?

- Country expertise average
- Transportation: 40%
- Technology: 59%
- Retail: 25%
- Personal & Household Care: 15%
- Media: 28%
- Luxury: 11%
- Internet Services: 15%
- Household Appliances: 16%
- Food & Beverage: 27%
- Financial Services: 11%
- Fashion: 11%
- Energy: 11%
- Consumer Electronics: 18%
- Automotive: 77%
- Alcohol: 31%

Country Brand Index 2014-15 FutureBrand ©
Sweden

2014-15 rankings
Sweden - Summary of perceptions

A country with a high standard of living, a good level of equality among its inhabitants without pockets of poverty and with general well-being. Good industry and good labour and social laws.

Respondent opinion on Sweden

Free society, tolerant and very friendly people, high social standard.

Respondent opinion on Sweden

What are the key associations with Sweden?

How does Sweden perform by dimension?

What words do people use to describe Sweden?

Respondent opinion on Sweden
What are the perceptions of ‘Made in Sweden’?

- Makes products that are authentic
- Makes products of high quality
- They create unique products
- Would like to buy products made in that country

Where does Sweden have most momentum?

- Technology & Innovation
- Political & Economic Influence
- Sustainability & Environmental Friendliness
- Cultural Significance

What brands do people associate with Sweden?

<table>
<thead>
<tr>
<th>Brand</th>
<th>Perception</th>
</tr>
</thead>
<tbody>
<tr>
<td>IKEA</td>
<td>25%</td>
</tr>
<tr>
<td>H&amp;M</td>
<td>18%</td>
</tr>
<tr>
<td>SAAB</td>
<td>15%</td>
</tr>
<tr>
<td>ABSOLUT VODKA</td>
<td>20%</td>
</tr>
<tr>
<td>Electrolux</td>
<td>20%</td>
</tr>
<tr>
<td>Volvo</td>
<td>24%</td>
</tr>
<tr>
<td>Scania</td>
<td>25%</td>
</tr>
</tbody>
</table>

What is Sweden most expert at?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>15%</td>
</tr>
<tr>
<td>Technology</td>
<td>40%</td>
</tr>
<tr>
<td>Retail</td>
<td>16%</td>
</tr>
<tr>
<td>Personal &amp; Household Care</td>
<td>21%</td>
</tr>
<tr>
<td>Media</td>
<td>18%</td>
</tr>
<tr>
<td>Luxury</td>
<td>20%</td>
</tr>
<tr>
<td>Internet Services</td>
<td>10%</td>
</tr>
<tr>
<td>Household Appliances</td>
<td>24%</td>
</tr>
<tr>
<td>Food &amp; Beverage</td>
<td>12%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>28%</td>
</tr>
<tr>
<td>Fashion</td>
<td>24%</td>
</tr>
<tr>
<td>Energy</td>
<td>18%</td>
</tr>
<tr>
<td>Consumer Electronics</td>
<td>16%</td>
</tr>
<tr>
<td>Automotive</td>
<td>25%</td>
</tr>
<tr>
<td>Alcohol</td>
<td>20%</td>
</tr>
</tbody>
</table>
2014-15 rankings

Canada
Canada - Summary of perceptions

What are the key associations with Canada?

- Political freedom
- Environmental friendliness
- Food
- Tolerance
- Health and education
- Standard of living
- Safety and security
- Would like to live in/study there
- Good for business
- Advanced technology
- Good infrastructure
- Historical points of interest
- Natural beauty
- Heritage, art and culture
- Range of attractions
- Value for money
- Quality of life
- Tourism
- Heritage and culture
- Business potential

How does Canada perform by dimension?

- Value system
- Quality of life
- Tourism
- Heritage and culture
- Business potential

Respondent opinion on Canada:

Because it is an innovative country with a lot of technology. It’s always at the forefront.

Because it is a country that seems very stable, economically and safety-wise. Those are two important aspects for me for both leisure and business.
Canada - Summary of perceptions

What are the perceptions of ‘Made in Canada’?
- Makes products that are authentic
- Makes products of high quality
- They create unique products
- Would like to buy products made in that country

Where does Canada have most momentum?
- Technology & Innovation
- Political & Economic Influence
- Sustainability & Environmental Friendliness
- Cultural Significance

What brands do people associate with Canada?
- RBC
- Canadian Tire
- BlackBerry
- Scotiabank
- Air Canada

What is Canada most expert at?
- Transportation
- Technology
- Retail
- Personal & Household Care
- Media
- Luxury
- Internet Services
- Household Appliances
- Food & Beverage
- Financial Services
- Fashion
- Energy
- Consumer Electronics
- Automotive
- Alcohol

Country expertise average
Top 20 most influential cities

This ranking shows which cities will be the most influential in three years’ time according to our respondents.
4. Key findings

1. Japan tops the ranking for the first time.
2. Awareness alone does not make a strong country brand.
3. Country brand strength is connected to how many consumer brands you are known for.
4. Strong country brands are seen to have expertise across multiple consumer categories.
5. Country brands have most momentum in technology, innovation and sustainability.
6. An influential city is not enough to make a strong country brand (but it helps).
Key findings

1. Japan tops the ranking for the first time.

Japan tops the ranking for the first time this year and sets a new benchmark for country brand strength. It enjoys a top five ranking in the Heritage & Culture and Tourism dimensions and leads perception strength in Business Potential and the newly created ‘Made In’ dimension. More than 65% of our respondents would consider visiting the country in the next five years and 90% would recommend it to family and friends. Nearly nine out of ten of those asked think Japan is a good country to do business with and 63% are prepared to buy its products and services compared to the ‘countries’ average - 20%.

Whilst Japan has always enjoyed strong perceptions in the minds of international travellers, these results secure its place as the strongest ‘country brand’ by our measures. It is joined by other strong Asian country brands in the top 20 including South Korea and Singapore, each of which show perception strength in the Business Potential dimension, but are given particular credit against the ‘advanced technology’ attribute.

Otherwise, the top twenty is dominated by European country brands, led by Switzerland and Germany but supported, as in previous years, by Scandinavia. Whilst we are not able to make direct ranking comparisons against previous studies, it is interesting to see that the addition of the ‘Made In’ dimension has bolstered the relative performance of countries like Japan within the top 20 and introduced new middle eastern leaders like UAE, but the members of that group remain fairly stable year on year even if rank positions change slightly.
Key findings

2. Awareness alone does not make a strong country brand.

This year’s study reinforces the perennial paradox of awareness: being well known does not always correlate to strong positive associations. For example, Italy enjoys higher awareness levels than Japan in our sample (89% compared to 84%) but is seventeen places lower in the rankings. Similarly, Mexico enjoys 80% awareness but is in the bottom third of the rankings. Conversely, Finland, Singapore, Iceland, the UAE and South Korea are all in the top twenty, but have awareness levels below 70%. So if being well known is not enough to drive positive perceptions, how should we understand the impact that global events can have on country brand strength?

There is no doubt that major international sporting and cultural events have a positive impact on awareness of the host country. We saw this with South Africa and Canada in 2010, which enjoyed significant uplift in awareness following the FIFA World Cup™ and Vancouver 2010 Winter Olympic Games respectively in our study. Importantly, however, South Africa’s ranking position remained the same whereas Canada improved. This is particularly important in 2014 in light of the Sochi Winter Olympic Games and the 2014 FIFA World Cup Brazil™. Both countries enjoyed a positive increase in their levels of awareness from 2012, with Russia increasing from 63% to 80% and Brazil leaping 17 points to 83% awareness year on year. This must correlate to international coverage of their events, both positive and negative.

However, whilst we cannot make absolute ranking comparisons with 2012, Russia’s perception strength against equivalent dimensions has improved, whereas Brazil now has weaker perceptions in attributes like Standard of living, Safety and Value for money. And both countries continue to suffer from relatively weak perceptions in important areas like Quality Of Life and Value System. We can perhaps understand this in terms of improved understanding of each country, in which familiarity creates a more realistic image of a country, and tempers idealised traveller perceptions that might artificially improve scores. But Canada offers a valuable case study of a country that deliberately used a major event to shape perceptions against its brand strategy and managed to connect improved awareness to the story it was keen to tell – all of which ultimately correlated to improved brand strength against our dimensions.
3. **Country brand strength is connected to how many consumer brands you are known for.**

There is a strong correlation between the ‘country brands’ in our study and spontaneous awareness of consumer brands associated with them. On average, our respondents demonstrated awareness of a larger number of brands across more categories for the 22 country brands, and those brands were often more international or global in reach. For example, Japan elicited associations with Toyota, Nintendo, Honda, Sony, Toshiba and Panasonic, reflecting perceptions of strong category expertise for the country in technology, consumer electronics and automotive. Conversely, countries with weaker perceptions in the ranking also tend to elicit fewer spontaneous consumer brand associations. Interestingly, flag carrying airlines were very frequently mentioned in association with countries across the study, and in the case of countries like Indonesia and Egypt, were the only brands respondents were able to recall, underscoring the important contribution air travel brands make towards building country brand perceptions.

4. **Strong country brands are seen to have expertise across multiple consumer categories.**

We asked respondents to tell us how far each country has ‘expertise’ across fifteen categories of products and services – from alcohol to transportation. Interestingly, the average score of ‘country brands’ is higher in all categories than the average score of ‘countries’ with the exceptions of Retail and Food and Beverage where most countries in the ranking get some degree of credit. The United States leads, enjoying better than average perceptions across fourteen categories and being strongest in Technology (72%).

And different countries are more strongly associated with different things. For example, France is most strongly associated with Fashion (65%), Germany with Automotive (77%) and Japan with Technology (78% - the highest score of a country in a category).

The ‘country brands’ also all benefit from stronger than average perceptions (23%) of creating ‘products of high quality’, with Germany and Japan leading the group. So it would seem clear that country brand strength strongly correlates to perceptions of expertise in the categories of goods and services that global consumers purchase every day.

One anomaly in the research is the occasional gap between spontaneous category associations and brands among our respondents. For example, the word ‘beer’ was most frequently mentioned in descriptions of Germany, but no respondent offered a German beer brand as an example of this. Which indicates that sometimes a country is associated with a product or service generically, without people connecting that place directly to consumption choices.
5. Country brands have most momentum in technology, innovation and sustainability.

Perceptions of momentum – how far a country is moving forwards and in what ways – are an interesting bellwether of future success. Conventional wisdom might suggest the strongest country brands are those with greatest momentum in political and economic influence or cultural significance. Interestingly, our study shows that most of the top ten country brands are seen to have more momentum in technology and innovation or sustainability and environmental friendliness, or both. In other words, the future drivers of competition for countries relate more to the contribution they are making to global progress and better management of the world’s resources, and ‘country brands’ are more keenly associated with these forces. Conversely, those ranked as ‘countries’ in our study are most likely to have the strongest momentum in cultural significance.

6. An influential city is not enough to make a strong country brand (but it helps).

Commentators sometimes assert that countries like the UK and the United States are synonymous with their most famous cities in people’s minds. To test this, we asked respondents to tell us which cities in the world will be the most influential in three years’ time – indicating their current strength and potential. Their answers demonstrated some interesting differences between country and city perception strength.

For example, our list of the twenty most influential cities does not include any in Norway or Denmark – both top ten country brands in this year’s study. And seven of the most influential cities are not even in the top twenty country brands, meaning that some cities rank higher in influence than their respective country brand position. Rio and São Paolo stand out against Brazil’s overall ranking of 43rd, New Delhi is the 13th most influential city compared to a bottom quartile country performance for India, and Beijing is seen as the world’s third most influential city compared to China’s overall ranking performance at 28th. Overall then, it seems that having an influential city does not guarantee country brand strength and brand strength does not depend on city perception alone.

The UK is often strongly identified with London, not least in the afterglow of the London 2012 Olympic Games, but London far out-performs the UK overall. However, like London, the majority (13) of the most influential cities are either the capitals or second major cities of top ten country brands, which is a strong reminder that country brand strength and city influence, whilst not the same thing, are often part of the same story in people’s perceptions.
5. What makes a country brand?
What makes a country brand?

Not all countries are country brands

1. Not all countries are country brands

The central hypothesis behind this year’s research was that not all countries qualify as ‘brands’, and the findings are striking. First of all, of the 75 countries included in our survey, only 22 qualify as ‘country brands’ by our measures.

Japan, Switzerland, Germany, Sweden, Canada, Norway, United States, Australia, Denmark, Austria, New Zealand, United Kingdom, Finland, Singapore, Iceland, Netherlands, France, Italy, United Arab Emirates and South Korea.

By this, we mean that people have stronger than average perceptions of the country across our six dimensions relating to the balance of ‘status’ and ‘experience’. In other words, they perceive it equally strong in aspects relating to Quality Of Life, Value System and Business Potential, as they do for its Culture, History, Tourism and ‘Made In’ expertise.

Those countries with a bias in favour of Quality Of Life, Value System and Business Potential are classified as ‘status countries’, and they include Belgium, Qatar and Bahrain. The brand development opportunity for these countries lies in perceptions of Culture, Tourism and ‘Made In’.

Those countries with a bias in favour of Culture, History, Tourism and ‘Made In’ are classified as ‘experience countries’ and include places traditionally strongly associated with Tourism. The brand development opportunity for these countries lies in perceptions of Quality Of Life, Value System and being Good for business.

The remaining ‘countries’ have weaker than average perceptions overall against both status and experience dimensions, although some are stronger than others. For example, Russia and Taiwan sit at the threshold of country brands in terms of perception strength, whereas Nigeria, Ukraine and Bangladesh have the weakest perceptions overall.
Country brands have a competitive advantage

2. Country brands have a competitive advantage

Strong positive perceptions are always desirable, but we wanted to test if ‘country brands’ actually have an advantage over their peers. Will people choose them when it comes to visiting and investing?

It is perhaps unsurprising that when people rate a country as a brand they have more confidence in and feel closer to it than the other countries in the study. Most significantly, however, our research shows that people are also more likely to visit, recommend and do business with a ‘country brand’. And twice as many people say they would buy products from a country brand than they would from a ‘country’. Which means that country brands have a tangible competitive advantage over other countries in the areas that are most likely to drive future success – from visiting for a holiday to business investment or daily consumption of products and services ‘made’ there.
What makes a country brand?

Which countries are ‘country brands’?

![Country Brand Index 2014-15](image-url)

- STATUS COUNTRIES
- EXPERIENCE COUNTRIES
- COUNTRY BRANDS

Average Experience Score

<table>
<thead>
<tr>
<th>Country Brand Index 2014-15</th>
<th>36</th>
</tr>
</thead>
</table>
What makes a country brand?

Rankings by dimension
### Rankings by dimension

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Value System</th>
<th>Quality of Life</th>
<th>Good for Business</th>
<th>Tourism</th>
<th>Heritage &amp; Culture</th>
<th>Made In</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>JAPAN</td>
<td>SWEDEN</td>
<td>SWITZERLAND</td>
<td>JAPAN</td>
<td>ITALY</td>
<td>ITALY</td>
<td>JAPAN</td>
</tr>
<tr>
<td>2</td>
<td>SWITZERLAND</td>
<td>CANADA</td>
<td>SWEDEN</td>
<td>UNITED STATES</td>
<td>JAPAN</td>
<td>GREECE</td>
<td>GERMANY</td>
</tr>
<tr>
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<td>SWITZERLAND</td>
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<td>GERMANY</td>
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<td>JAPAN</td>
<td>SWITZERLAND</td>
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<td>NORWAY</td>
<td>DENMARK</td>
<td>SINGAPORE</td>
<td>CANADA</td>
<td>FRANCE</td>
<td>UNITED STATES</td>
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<td>CANADA</td>
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<td>FRANCE</td>
<td>EGYPT</td>
<td>FRANCE</td>
</tr>
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<td>ICELAND</td>
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<td>DENMARK</td>
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<td>NETHERLANDS</td>
<td>FINLAND</td>
<td>UNITED KINGDOM</td>
<td>AUSTRIA</td>
<td>SPAIN</td>
<td>NORWAY</td>
</tr>
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</table>
6. Regional rankings
In addition to overall perception rankings, we are able to show the relative regional performance of each country, including the regional leader and their strengths against the average. For example, we can compare Japan’s scores against the average for Asia-Pacific.

Each regional summary presents the country ranking, how many ‘country brands’ each region has, the strengths and weaknesses of the region across the dimensions and attributes, and a visual comparison (radar map) of the leading country attribute scores with the regional average – e.g. against ‘value for money’ or ‘food’. The strongest perceptions by attribute in each case are highlighted using a coloured circle. We also show the awareness levels for the top and bottom ranked country by region.
Regional rankings

North America and the Caribbean

<table>
<thead>
<tr>
<th>Country</th>
<th>Overall Ranking</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
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<td>85%</td>
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<tr>
<td>United States</td>
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<td></td>
</tr>
<tr>
<td>Jamaica</td>
<td>51</td>
<td>65%</td>
</tr>
</tbody>
</table>

**Region’s key strengths**
- Natural beauty
- Range of attractions
- Visit for holiday
- Good Infrastructure
- Advanced technology

**Region’s key weaknesses**
- Food
- Heritage, art & culture
- Historical points of interest
- Value for money

Country Brands

2

Country Brand Index 2014-15
### Latin America

#### Regional rankings

<table>
<thead>
<tr>
<th>Country</th>
<th>Overall Ranking</th>
</tr>
</thead>
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<tr>
<td>Puerto Rico</td>
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<td>Panama</td>
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</tr>
<tr>
<td>Argentina</td>
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</tr>
<tr>
<td>Brazil</td>
<td>43</td>
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<tr>
<td>Chile</td>
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<tr>
<td>Mexico</td>
<td>55</td>
</tr>
<tr>
<td>Colombia</td>
<td>63</td>
</tr>
</tbody>
</table>

#### Region’s key strengths
- Natural beauty
- Range of attractions
- Visit for holiday
- Historical points of interest

#### Region’s key weaknesses
- Political freedom
- Health & education
- Standard of living
- Advanced technology
- Good infrastructure

#### Country Brands

- **Puerto Rico**: N/A
- **Latin America**: N/A

#### Awareness

- **60%** in Latin America

---

*Country Brand Index 2014-15*
### Regional rankings: Europe

<table>
<thead>
<tr>
<th>Country</th>
<th>Region’s key strengths</th>
<th>Region’s key weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>Visit for holiday</td>
<td>Value for money</td>
</tr>
<tr>
<td></td>
<td>Range of attractions</td>
<td>Food</td>
</tr>
<tr>
<td></td>
<td>Natural beauty</td>
<td>Good for business</td>
</tr>
<tr>
<td></td>
<td>Historical points of interest</td>
<td>Good infrastructure</td>
</tr>
<tr>
<td></td>
<td>Heritage, art &amp; culture</td>
<td>Advanced technology</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall Ranking</th>
<th>Country</th>
<th>Awareness</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Switzerland</td>
<td>81%</td>
</tr>
<tr>
<td>2</td>
<td>Spain</td>
<td>65%</td>
</tr>
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<td>3</td>
<td>Germany</td>
<td>65%</td>
</tr>
<tr>
<td>4</td>
<td>Greece</td>
<td>65%</td>
</tr>
<tr>
<td>5</td>
<td>Denmark</td>
<td>65%</td>
</tr>
<tr>
<td>6</td>
<td>Russia</td>
<td>65%</td>
</tr>
<tr>
<td>7</td>
<td>Austria</td>
<td>65%</td>
</tr>
<tr>
<td>8</td>
<td>United Kingdom</td>
<td>65%</td>
</tr>
<tr>
<td>9</td>
<td>Portugal</td>
<td>65%</td>
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<td>10</td>
<td>Croatia</td>
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</tr>
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<td>Czech Republic</td>
<td>65%</td>
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<tr>
<td>12</td>
<td>Poland</td>
<td>65%</td>
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<tr>
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<td>Estonia</td>
<td>65%</td>
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<tr>
<td>14</td>
<td>Turkey</td>
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<tr>
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<td>Hungary</td>
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<tr>
<td>16</td>
<td>Slovakia</td>
<td>65%</td>
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<tr>
<td>17</td>
<td>Romania</td>
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<tr>
<td>18</td>
<td>Bulgaria</td>
<td>65%</td>
</tr>
<tr>
<td>19</td>
<td>Ukraine</td>
<td>65%</td>
</tr>
</tbody>
</table>

**Notes:**
- Switzerland: 81% Awareness
- Spain: 65% Awareness
- Germany: 65% Awareness
- Greece: 65% Awareness
- Denmark: 65% Awareness
- Russia: 65% Awareness
- Austria: 65% Awareness
- Poland: 65% Awareness
- Croatia: 65% Awareness
- Czech Republic: 65% Awareness
- Portugal: 65% Awareness
- Hungary: 65% Awareness
- Slovakia: 65% Awareness
- Bulgaria: 65% Awareness
- Ukraine: 65% Awareness

**Country Brands:**
- 13

**Region’s key strengths:**
- Visit for holiday
- Range of attractions
- Natural beauty
- Historical points of interest
- Heritage, art & culture

**Region’s key weaknesses:**
- Value for money
- Food
- Good for business
- Good infrastructure
- Advanced technology
Regional rankings

Asia-Pacific

<table>
<thead>
<tr>
<th>Country</th>
<th>Overall Ranking</th>
<th>Region’s key strengths</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>1</td>
<td>Visit for holiday, Range of attractions, Natural beauty, Historical points of interest</td>
</tr>
<tr>
<td>Australia</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td>11</td>
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</tr>
<tr>
<td>Singapore</td>
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<tr>
<td>South Korea</td>
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<td>Fiji</td>
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<td>China</td>
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<td>Taiwan</td>
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<td>India</td>
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<td>Sri Lanka</td>
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<td>Vietnam</td>
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<td>Indonesia</td>
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<td>Cambodia</td>
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<tr>
<td>Bangladesh</td>
<td>72</td>
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<tr>
<td>Pakistan</td>
<td>73</td>
<td></td>
</tr>
</tbody>
</table>

Country Brands

- Japan
- Asia-Pacific

Region’s key strengths
- Visit for holiday
- Range of attractions
- Natural beauty
- Historical points of interest

Region’s key weaknesses
- Political freedom
- Good for business
- Tolerance
- Value for money
- Resort & lodging

Awareness:
- Japan: 84%
- Asia-Pacific: 61%
Regional rankings

Middle East and North Africa

Overall Ranking

19 United Arab Emirates
24 Quatar
26 32 34 Israel
32 Bahrain
34 Oman
39 Saudi Arabia
54 Egypt
57 Morocco
58 Jordan
61 Lebanon
71 Iran

Region’s key strengths

Visit for holiday
Range of attractions
Resort & lodging
Historical points of interest
Heritage, art & culture

Region’s key weaknesses

Political freedom
Would like to live/study there
Value for money

Country Brands

66% Awareness

Awareness

United Arab Emirates
Quatar
Israel
Bahrain
Oman
Saudi Arabia
Egypt
Morocco
Jordan
Lebanon
Iran

Awareness

Country Brand Index 2014-15
Regional rankings

Africa

<table>
<thead>
<tr>
<th>Country</th>
<th>Awareness</th>
<th>Overall Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Africa</td>
<td>72%</td>
<td>40</td>
</tr>
<tr>
<td>Kenya</td>
<td>58%</td>
<td>65</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>58%</td>
<td>69</td>
</tr>
<tr>
<td>Ghana</td>
<td>72%</td>
<td>70</td>
</tr>
<tr>
<td>Nigeria</td>
<td>72%</td>
<td>75</td>
</tr>
</tbody>
</table>

Region’s key strengths
- Visit for holiday
  - Natural beauty

Region’s key weaknesses
- Advanced technology
- Good infrastructure
- Political freedom
- Tolerance
- Safety & security
- Health & education
- Good for business

Country Brands
- N/A
7. Future focus
Future focus

Ones to watch

1. China
2. United Arab Emirates
3. South Korea
4. Israel
5. Qatar
China, the United Arab Emirates, South Korea, Israel and Qatar are the countries our respondents felt were most likely to be ‘moving forwards’ in three years’ time. These countries have strong perceptions around ‘Business Potential’ and are seen to have momentum in innovation as well as expertise in energy and technology – all of which correlate to country brand strength. And more than 50% of our respondents indicate they would consider visiting these countries in the next five years – with China enjoying the highest consideration. Of the ‘ones to watch’, South Korea enjoys the highest ‘Made In’ ranking (#8 overall), perhaps not a surprise when we consider the significant growth of Samsung and other South Korean brands and organizations over the last 10 years. Samsung enjoys a top 10 position in the FutureBrand Index study and is one of the largest companies in the world by market capitalization.
Dominant themes

This year’s research has surfaced three dominant themes that we believe will have an influence on the future of countries as brands:

**Extremism**

From the increased electoral significance of populist extremist parties like the National Front and the Austrian Freedom Party in Europe to Islamic fundamentalism and the rise of ISIS and Boko Haram in the Middle East and Africa, there is a growing preoccupation with extremism and polarization around economic, social and religious issues around the world. In this climate of uncertainty and social anxiety, we would expect to see an equivalent increase in freedom, stability and security as drivers of country brand strength. Countries that enjoy the strongest perceptions in the dimension of Political freedom like Canada #1, Sweden #2 and Denmark #3, and Tolerance, Safety and security (Switzerland #1) are important benchmarks for country brand managers seeking to encourage visitor confidence.

**Migration**

The number of people living abroad around the world is increasing every year according to the UN (232 million in 2013 compared to 154 million in 1990). This rise correlates to factors like growing global middle class discretionary income and low cost travel and accommodation, but also country and regional cooperation around trade and migration across borders, driven by the search for the best work and education opportunities, or flight from economic or social difficulty. These migrants are naturally drawn to countries they perceive to be more open and tolerant, whose education and welfare systems are the most liberal and that enjoy the best infrastructure. With that in mind, the brand building activities of countries that enjoy the strongest perceptions in Infrastructure (Japan #1, Germany #2 and Switzerland #3), being Good for business (USA #1, Germany #2 and Japan #3) and Health and education (Switzerland #1, Sweden #2 and Germany #3) offer a guide to the levers countries can pull to capitalize on this trend.

**Conscious consumption**

We are increasingly preoccupied with the impact our consumption has on the world around us and understand that whilst resources might come from specific countries – like food or energy or raw materials – their use effects the entire planet, and that some countries and regions have better access to those resources than others. In that context, companies are making an increased effort to improve transparency around their global supply chains, and consumers are taking a more active interest in the provenance and manufacturing processes behind the products and services they consume. This is a major factor in the increasing role of country of origin in consumption decisions as consumers and organizations seek to reconcile our perceptions of expertise, quality and provenance with the actual ownership and manufacturing base of the things we consume. In addition to reinforcing strength of perception around category expertise in this context, countries will do well to build stronger simultaneous associations in Environmental friendliness (Switzerland #1, Norway #2 and New Zealand #3) Standard of living (Switzerland #1, Norway #2 and Germany #3) and making High quality products (Germany #1, Japan #2 and Switzerland #3) in a world where people still want a good quality of life without it costing the earth.
Country brand drivers

We already know from our ‘Made In’ research that ‘Country of Origin’ is an increasingly important driver of consumer choice when it comes to goods and services. The evidence from this report suggests that the reverse is also true – a reputation for high quality products is a main driver of a ‘country brand’. For example, 70% of our respondents believe this about Germany – a top three country brand in this year’s rankings – compared to an average of 14% for those classified as ‘countries’. The two other main drivers are a desire to visit or study in a country and perceptions of good infrastructure. These three factors make the most difference between a country and a country brand, and demonstrate the power of consumer desire in country brand strength. It is perhaps no coincidence that the top 100 ranking of World Universities is dominated by most of our ‘country brands’ (source: topuniversities.com). With that in mind, we would expect countries that prioritize developing and promoting high quality products, making it easy and attractive for visitors to study and work and investing in their core infrastructure – from communications to energy and transport links – to have a brand strength advantage over their peers in the next five years.
### Overall ranking

<table>
<thead>
<tr>
<th>Overall Ranking</th>
<th>Country</th>
<th>Overall Ranking</th>
<th>Country</th>
<th>Overall Ranking</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Japan</td>
<td>16</td>
<td>Russia</td>
<td>31</td>
<td>Chile</td>
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<td>2</td>
<td>Switzerland</td>
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<td>Estonia</td>
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<td>Germany</td>
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<td>Puerto Rico</td>
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<td>Saudi Arabia</td>
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<td>Egypt</td>
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<td>10</td>
<td>Austria</td>
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<td>South Africa</td>
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<td>Panama</td>
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<td>Brazil</td>
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<td>Croatia</td>
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<td>Slovakia</td>
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<td>Iceland</td>
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<td>Sri Lanka</td>
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<td>Lebanon</td>
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<td>France</td>
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<td>Estonia</td>
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<td>Romania</td>
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<td>Italy</td>
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<td>Malaysia</td>
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<td>Colombia</td>
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<td>United Arab Emirates</td>
<td>34</td>
<td>Peru</td>
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<td>Vietnam</td>
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<td>Ireland</td>
<td>36</td>
<td>Jamaica</td>
<td>51</td>
<td>Indonesia</td>
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<td>22</td>
<td>Belgium</td>
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<td>Uruguay</td>
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<td>Israel</td>
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<td>Greece</td>
<td>45</td>
<td>Sri Lanka</td>
<td>60</td>
<td>Nigeria</td>
</tr>
</tbody>
</table>
We have made some improvements to the methodology in this year’s research to enrich our understanding and definition of country brands. As a result, whilst there are many areas of continuity, this year’s study does not include direct like-for-like ranking comparisons with previous years. The major changes are as follows:

1. The addition of a new ‘Made In’ dimension

We have introduced a new dimension to this year’s report assessing strength of perception around ‘Made in’ for each country. This is made up of four attributes:

1. ‘Makes products that are authentic’
2. ‘Makes products of high quality’
3. ‘Creates unique products’
4. ‘Would like to buy products made in that country’

2. Rationalization of existing dimensions and attributes

This year, we have slightly adapted the existing dimensions and attribute groupings for improved clarity and efficiency. Readers of previous reports and rankings should check for points of continuity and where things have changed to make their own comparisons:

Value System:
- Attributes included: Political system, Environmental friendliness and Tolerance
- Attributes removed: Stable legal environment and Freedom of speech

Quality Of Life:
- Attributes included: Health & education (now merged), Standard of living, Safety & security and Would like to live/study there
- Attributes removed: Job opportunity

Business Potential (formerly ‘Good for business’):
- Attributes included: Good for business, Advanced technology, Good infrastructure
- Attributes removed: Investment climate, Regulatory environment, Skilled workforce

Heritage & Culture:
- Attributes included: Historical points of interest, Art & culture and Natural beauty
- Attributes removed: Authenticity

Tourism:
- Attributes included: Health & education (now merged), Standard of living, Safety & security and Would like to live/study there
- Attributes removed: Job opportunity

3. The sample of countries assessed has changed

The total number of countries included in the 2014-15 ranking is 75 compared to 118 in 2012-13. We rationalized the countries included based on a series of criteria, including perception strength in previous studies, in order to accommodate more in-depth analysis of each country.
Thank you!

For further information please contact:

Damien Moore-Evans
Global Marketing Manager

DD. +44 (0)20 7067 0595
M. +44 (0)7920 590345

Follow: @FutureBrand
dmoore-evans@futurebrand.com

2 Waterhouse Square
140 Holborn
London EC1N 2AE

fblog.futurebrand.com
www.futurebrand.com