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## The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> 2009 Highlights Report

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GfK Roper Public Affairs & Media

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## Introduction to 2009 NBI<sup>SM</sup>

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The way a country is perceived can make a critical difference to the success of its business, trade and tourism efforts, as well as its diplomatic and cultural relations with other nations.

Simon Anholt and GfK Roper Public Affairs & Media are pleased to bring you the 2009 Anholt-GfK Roper Nation Brands Index<sup>SM</sup> Report. The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> represents a unique collaboration combining the heritage and authority of GfK Roper's three-quarters of a century of experience in public affairs research with the expertise of Simon Anholt to offer a unique barometer of global opinion.

Since 1996, when he coined the term 'nation brand' and gave birth to this important new field, Simon Anholt has been helping governments plan the policies, strategies, investments and innovations which lead their country towards an improved profile and reputation. Anholt developed the Nation Brands Index<sup>®</sup> in 2005 as a way to measure the image and reputation of the world's nations, and to track their profiles as they rise or fall. In 2008, Simon Anholt entered a partnership with GfK Roper Public Affairs & Media to offer the Anholt-GfK Roper Nation Brands Index<sup>SM</sup> – an expanded Nation Brands Index<sup>®</sup> providing governments and their agencies with a one-of-a-kind resource for actionable insights needed to more effectively manage a country's reputation.

### The Anholt-GfK Roper Nation Brands Index<sup>SM</sup>

Conducted annually with GfK Roper beginning in spring 2008, the Anholt-GfK Roper Nation Brands Index<sup>SM</sup> measures the image of 50 nations. Each year, approximately 20,000 adults ages 18 and up are interviewed in 20 core panel countries.

The Anholt-GfK Roper Nation Brands Index<sup>SM</sup> measures the power and appeal of each country's 'brand image' by examining six dimensions of national competence. Together, these dimensions make up the Nation Brand Hexagon<sup>®</sup>.

**Exports.** This is what marketers call the "country of origin effect" – whether knowing where the product is made increases or decreases people's likelihood of purchasing it, and whether a country has particular strengths in science and technology, and has creative energy. Perceived associations with particular industries round out that country's image in this space.

**Governance.** This aspect incorporates perceived competency and honesty of government, respect for citizens' rights and fair treatment, as well as global behavior in the areas of international peace and security, environmental protection, and world poverty reduction. Respondents also select one adjective that best describes the government in each country.

**Culture.** Cultural aspects measured are perceptions of a country's heritage, its contemporary cultural "vibes" from music, films, art and literature, as well as the country's excellence in sports. Various cultural activities are presented to respondents to gauge their strongest images of a country's cultural "product."

**People.** The general assessment of a people's friendliness is measured by whether respondents would feel welcome when visiting the country. Additionally, we measure the appeal of the people on a personal level – whether respondents want to have a close friend from that country – as well as human resources on a professional level, that is, how willing respondents would be to hire a well-qualified person from that country. Respondents are also asked to select adjectives out of a list to describe the predominant images they have of the people in each country.

**Tourism.** Respondents rate a country's tourism appeal in three major areas: natural beauty, historic buildings and monuments, and vibrant city life and urban attractions. Tourism potential is also asked: how likely they would be to visit a country if money is no object and the likely experience represented by adjectives such as romantic, stressful, spiritual, etc.

**Immigration and Investment.** Lastly, a country's power to attract talent and capital is measured not only by whether people would consider studying, working and living in that country but also by the country's economic prosperity, equal opportunity, and ultimately the perception that it is a place with a high quality of life. The country's economic and business conditions – whether stagnant, declining, developing or forward-thinking – complete the measurement in this space.

The NBI<sup>SM</sup> score is an average of the scores from the six indices mentioned above. There are between 3 and 5 ratings questions for each of the indices. Ratings are based on a scale from 1 to 7 with 7 being the highest and best, 1 being the lowest and worst, and 4 being the middle position which is neither positive nor negative. Each hexagon point also has a word choice question which helps enrich the understanding of the properties of a nation's image.

## The 2009 NBI<sup>SM</sup> Survey

The 2009 NBI<sup>SM</sup> survey is conducted in 20 major developed and developing countries that play important and diverse roles in international relations, trade and the flow of business, cultural, and tourism activities. Given the increasing global role played by developing countries, the survey strives to represent regional balance as well as the balance between high-income and middle-income countries. The core 20 panel countries are:

- Western Europe/North America: U.S., Canada, the UK, Germany, France, Italy, Sweden
- Central and Eastern Europe: Russia, Poland, Turkey
- Asia-Pacific: Japan, China, India, South Korea, Australia
- Latin America: Argentina, Brazil, Mexico
- Middle East/Africa: Egypt, South Africa

In all, 20,939 interviews have been conducted with approximately 1,050 interviews per country for the 2009 NBI<sup>SM</sup> Survey. Adults age 18 or over who are online are interviewed in each country. Using the most up-to-date online population parameters, the achieved sample in each country has been weighted to reflect key demographic characteristics such as age, gender, and education of the 2009 online population in that country. Additionally, in the United States, South Africa, India and Brazil, race/ethnicity has been used for sample balancing. The report reflects the views and opinions of online populations in these 20 countries -- citizens who are connected to the world.

The NBI<sup>SM</sup> measures the image of 50 nations. In each panel country except Egypt, the list of 50 nations is randomly assigned to respondents, each of whom rates 25 nations, resulting in each nation getting approximately 500 ratings per panel country. In Egypt, where respondents are not as familiar and experienced with online surveys, survey length was reduced, resulting in each nation getting approximately 250 ratings.

The list of 50 nations is based on the political and economic importance of the nations in global geopolitics and the flow of trade, businesses, people, and tourism activities. Regional representation and, to some extent, the diversity of political and economic systems are taken into consideration to make the study truly global. NBI<sup>SM</sup> subscription members' interests are also reflected in the selection of the countries.

The list of 50 nations<sup>1</sup> is as follows, listed by region:

- North America: U.S., Canada
- Western Europe: The UK, Germany, France, Italy, Spain, Ireland, Scotland, Sweden, Denmark, Norway\*\*, Iceland\*\*, Holland/The Netherlands, Belgium, Switzerland, Finland, Austria
- Central/Eastern Europe: Russia, Poland, Czech Republic, Estonia, Lithuania, Hungary, Turkey, Romania
- Asia Pacific: Japan, South Korea, China, India, Thailand, Indonesia, Malaysia, Singapore, Taiwan, Australia, New Zealand
- Latin America: Argentina, Brazil, Mexico, Chile, Ecuador, Peru, Cuba, Colombia\*
- Middle East/Africa: United Arab Emirates, Iran, Egypt, Saudi Arabia, South Africa, Angola\*, Kenya\*, Nigeria\*\*

Due to the expanded coverage – regarding nations measured, and in the number of questions asked – and the more stringent sample distribution control compared to NBI<sup>SM</sup> studies prior to 2008 – no trend comparisons are made to pre-2008 data. Conscious efforts were made to keep the 2009 NBI methodology comparable to the 2008 NBI, including core questionnaire content, sample design, sampling techniques, and fieldwork procedures. Thus, comparisons between countries' 2008 and 2009 rankings are reported this year. Qualitative assessment of whether and how the image of a country has improved in relationship to other countries that have been in waves before 2008 can be discussed on a case-by-case basis.

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<sup>1</sup> Chinese respondents are asked of all nations except their own. Holland is asked about in 2009 and the Netherlands in 2008. Holland was not asked in Germany in 2009 due to a translation error.

\* Nations new to the NBI 2009

\*\* Nations included in 2008 but not included in 2009



## 2009 Global Index

Brand America is now ranked #1 by global citizens. Results from the 2009 Anholt-GfK Roper Nation Brands Index<sup>SM</sup> (NBI) show the United States taking the top spot as the country with the best overall brand, up from seventh last year. The rankings of the top ten countries for 2009 are shown below.

“What’s really remarkable is that in all my years studying national reputation, I have never seen any country experience such a dramatic change in its standing as we see for the United States in 2009,” explains Simon Anholt, NBI founder and an independent advisor to over a dozen national governments around the world. “Despite recent economic turmoil, the U.S. actually gained significant ground. The results suggest that the new U.S. administration has been well received abroad and the American electorate’s decision to vote in President Obama has given the United States the status of the world’s most admired country.”

<b>Anholt-GfK Roper Nation Brands Index<sup>SM</sup></b>		
<b>Overall Brand Ranking</b>		
<b>(Top 10 of 50 Nations)</b>		
	<b>2009</b>	<b>2008</b>
1	United States	Germany
2	France	France
3	Germany	United Kingdom
4	United Kingdom	Canada
5	Japan	Japan
6	Italy	Italy
7	Canada	United States
8	Switzerland	Switzerland
9	Australia	Australia
10	Spain, Sweden (tie)	Sweden

*Source: 2009 and 2008 Anholt-GfK Roper Nation Brands Index<sup>SM</sup>*

“This improved perception of the U.S. is not only in the area of Governance, there are improved perceptions for People, Culture and even Tourism of the United States,” adds Xiaoyan Zhao, Senior Vice President and director of the NBI study at GfK Roper Public Affairs & Media. “While most nations’ reputation does not undergo major change from year to year, the U.S. has clearly bucked the trend. What’s key for the U.S. and other world’s leading nations is to strike while the iron is hot and develop focused policies and communication that draw businesses, financial investors and tourists -- in order to help lift their national economies and their global credibility.”

Turning to the rest of the NBI rankings, mostly the same countries are in the top ten as in 2008 – but also with some shifts in position. France again captured second place overall, while Germany and the United Kingdom fell to third and fourth, respectively. Japan (5th) and Italy (6th) did not shift rankings from 2008. However, Canada lost ground, slipping from fourth last year to seventh in 2009. Switzerland, Australia, Spain, and Sweden round out the top 10.

The midlevel countries include emerging economy giants BRIC nations, and developing Latin American economies of Argentina and Mexico. Developing countries represent other major movers in the overall ranking, for example, China has climbed several spots from last year to 22nd in 2009.

With the exception of Egypt, Middle Eastern countries are ranked in the bottom 10, joined by a couple of African countries, as well as several low visibility countries from the Baltic region and Latin America.

Following are key ranking examples in each hexagon brand dimension along with brief excerpts from the full report analyses.



## 2009 Exports Index

Japan, the United States, and Germany, the world's three largest economies, are still situated in the top three spots for the Exports dimension. What is interesting is that the United States has strengthened its position relative to Japan and Germany by narrowing the gap with Japan (from 2+ points in 2008) while enlarging the lead over Germany. A closer look reveals that the U.S. is now tied with Japan for the No. 1 spot in contribution to science and technology. While Japan has retained its leadership position in cutting edge ideas – No. 1 in 10 of the 20 survey countries – it now has a narrower lead over the U.S. which is now ranked either top 1 or 2 in 11 countries and has no standing lower than 4. And while Germany has a virtual tie with Japan in “value-add” country of origin (unchanged from 2008), its third place position in science and technology contribution and in cutting edge ideas trails the United States at a greater distance now compared to that recorded in 2008.

Exports Brand Ranking	
1	Japan
2	United States
3	Germany
13	Russia
17	China

Two of the emerging economy giants, Russia and China, not only show improved scores, but have surpassed smaller advanced economies in the rankings.



## 2009 Governance Index

Some Western European countries are join Canada in forming the top group for the Governance dimension. And as in 2008 we see no developing countries rank in the top 20. As discussed in the 2008 report, for this point of the hexagon, it seems that a country's size is not positively correlated with its ranking, as many smaller countries perform very well. In contrast, China, Russia, and the U.S. (even with its notably improved performance in 2009), powerhouses championing competing political economic models and contentious world views, all have considerably lower ranks along the Governance dimension, compared to their performance on other dimensions such as Exports or Culture.

Governance Brand Ranking	
1	Canada
2	Switzerland
3	Sweden
18	United States
49	China



## 2009 Culture Index

As in 2008, the top countries on the Culture Index are generally large Western European countries that do well on all three culture questions. France and Italy, have relatively balanced cultural brands that span sport, cultural heritage, and contemporary culture. An exception, the U.S. sits in the 3<sup>rd</sup> position due to its position as the world leader in sports and contemporary pop culture despite ranking 26<sup>th</sup> for cultural heritage.

Culture Brand Ranking	
1	France
2	Italy
3	United States
15	Egypt
17	India

The Culture dimension is where large developing countries shine compared to their rankings in other dimensions. For example, China, Russia, and Brazil break into the top 10 group, as they did in 2008. Egypt, China, and India, widely known for their ancient civilizations, get some of their best scores in this dimension, lifted primarily by the rich cultural heritage question in which they rank 1<sup>st</sup>, 3<sup>rd</sup>, and 6<sup>th</sup> respectively.



## 2009 People Index

Canada and Australia, as in 2008, get the top two spots for the People ranking, with Canada getting the top rank for two out of the three People questions. Western European countries, as well as the U.S. and Japan make up the remainder of the spots in top ten. We observed in 2008 that breaking the pattern in the overall rankings, and true to their reputation, the people of Latin American countries appeared to be seen more positively than the people of developing Asia and the people of former Soviet bloc countries. This pattern still holds true for Argentina, Brazil, and Mexico.

People Brand Ranking	
1	Canada
2	Australia
3	Italy
17	Brazil
35	China

China has made great strides in its People ranking.



## 2009 Tourism Index

According to the June 2009 edition of the UNWTO World Tourism Barometer, with the exception of Africa, tourism arrivals in all regions across the world have decreased in 2009. With the global economic crisis and the concerns about the outbreak of the influenza affecting international travelers almost all over the world, it is not surprising that most countries have seen their Tourism dimension scores decrease compared to 2008. However, the rankings for most of the countries have stayed remarkably similar with a couple of exceptions. Italy, France, and Spain have kept their top three rankings. These countries, which rank in the top ten for all four Tourism questions, feature a variety of widely popular destinations.

Tourism Brand Ranking	
1	Italy
2	France
3	Spain
4	United States
33	South Africa

Aside from this top group, most countries get by with tourism industries that are characterized by one or two strong areas. As discussed in our 2008 report, unlike other hexagon dimensions, a country can have a very strong tourism brand even if it only fares well in one or two areas.



## 2009 Immigration/Investment Index

Canada, as it did in 2008, gets the top spot in the Immigration/Investment Index, ranking in the top 5 for each of the component questions and first for people's willingness to work and live there, and for equal opportunity. As discussed in our 2008 report, Canada's leading status in the Immigration/Investment hexagon dimension is not surprising given that it has a relatively liberal immigration policy and the world's highest rate of per capita immigration.

While the Immigration/Investment Index reflects economic growth potential and opportunities, quality of life is an important ingredient of the overall attractiveness. The largest emerging countries, such as China which ranks 16<sup>th</sup> on the question of having promising businesses, are all located in the lower half of the rankings, somewhat dragged down by their lower rankings on the quality of life and equal opportunity aspects.

Immigration/Investment Brand Ranking	
1	Canada
2	United States
3	Switzerland
33	China
42	India

### **About GfK Roper Public Affairs & Media**

GfK Roper Public Affairs & Media is a division of GfK Custom Research North America. The division specializes in customized public affairs and public opinion polling, media & communications research, and corporate reputation measurement -- in the US and globally. In addition to delivering a broad range of customized research studies, GfK Roper Public Affairs & Media draws from GfK's syndicated consumer tracking services, GfK Roper Reports® US and GfK Roper Reports® Worldwide, which monitor consumer values, beliefs, attitudes and behaviors in the US and more than 25 other countries.

As of September 2008, GfK Roper Public Affairs and Media became the official polling partner of the Associated Press launching the AP-GfK Poll. For more information on the AP-GfK Poll, visit: <http://www.ap-gfkpoll.com/index.html>

### **About GfK Custom Research North America**

Headquartered in New York, GfK Custom Research North America is part of the GfK Group. GfK Group offers the fundamental knowledge that industry, retailers, services companies and the media need to make market decisions. It offers a comprehensive range of information and consultancy services in the three business sectors of Custom Research, Retail and Technology and Media. The no. 4 market research organization worldwide, GfK Group operates in more than 100 countries and employs over 10,000 staff. In 2008, GfK Group sales amounted to EUR 1.2 billion (1.6 Billion USD). For further information, visit our website: [www.gfkamerica.com](http://www.gfkamerica.com).

### **About Simon Anholt**

Simon Anholt is recognized as the world's leading authority on nation image and identity. He is a member of the UK Government's Public Diplomacy Board, and works as an independent advisor to around 20 other national, regional and city governments on identity strategy and public diplomacy. Anholt developed the concept of the Nation Brands Index in 2005. He is founding editor of the quarterly journal, *Place Branding and Public Diplomacy*, and the author of *Brand New Justice*, *Brand America* and *Competitive Identity - the New Brand Management for Nations, Cities and Regions*. His forthcoming book, *Places*, will be published by Macmillan in November 2009, together with a completely new edition of *Brand America*.

### **For More Information**

Full copies of the 2009 Anholt-GfK Roper Nation Brands Index<sup>SM</sup> (NBI) report, customized by country, are available for purchase through GfK Roper Public Affairs & Media. To order, contact Toni Shields at (212) 240-5512 ([toni.shields@gfk.com](mailto:toni.shields@gfk.com)) or Laura Latshaw at (610) 356-3033 ([Laura.Latshaw@gfk.com](mailto:Laura.Latshaw@gfk.com)).

In 2009, GfK and Anholt also conducted research for the Anholt-GfK Roper City Brands Index<sup>SM</sup> which provides information similar to the Nation Brands Index<sup>SM</sup> for 50 global cities. For more information, please visit [www.gfkamerica.com](http://www.gfkamerica.com) and/or [www.simonanholt.com](http://www.simonanholt.com).