



The Anholt-GfK Roper Nation Brands IndexSM 2009 Report

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Introduction to 2009 NBISM

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 IndexSM Report. The Anholt-GfK Roper Nation Brands IndexSM 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[®] 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 has entered a partnership with GfK Roper Public Affairs & Media to offer the Anholt-GfK Roper Nation Brands IndexSM – an expanded Nation Brands Index[®] 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 IndexSM

Conducted annually with GfK Roper beginning spring 2008, the Anholt-GfK Roper Nation Brands IndexSM 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 IndexSM 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[®].

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 NBISM 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 NBISM Survey

The 2009 NBISM 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 NBISM 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 NBISM 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. NBISM subscription members' interests are also reflected in the selection of the countries.

The list of 50 nations¹ 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 NBISM studies prior to 2008, trend comparisons are conducted starting with 2009. Conscious efforts are made to keep the 2009 NBI methodology comparable to the 2008 NBI, including core questionnaire content, sample design, sampling techniques, and fieldwork procedures. Thus, this year ranking change comparisons are reported between 2008 and 2009. 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.

¹ 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

About GfK Roper Public Affairs & Media and GfK Custom Research North America

GfK Roper Public Affairs & Media is a division of GfK Custom Research North America. The division specializes in customized public opinion polling, media and 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.

Headquartered in New York, GfK Custom Research North America is part of the GfK Group. With home offices in Nuremberg, Germany, the GfK Group is the No. 4 market research organization worldwide. Its activities cover the three business sectors of Custom Research, Retail and Technology and Media. The Group has 115 companies covering over 90 countries. Of a total of approximately 8,760 employees (as of September 30, 2007), 80% are based outside Germany.

About Simon Anholt

Simon Anholt is recognized as the world's leading authority on national 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 brand 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.

Highlights and Implications

- Weathering the global financial crisis, Switzerland has maintained its strong reputation, retaining its 8th overall NBISM ranking from last year
- Switzerland is rated as a top 20 nation on all six hexagon dimensions
- Switzerland ranks 2nd on Governance (passed by Canada), while maintaining its ranking at 1st for respecting the rights of its citizens, and behaving responsibly to protect the environment
- Switzerland has surpassed the United Kingdom to rank 3rd in Immigration/Investment. It has the No. 1 position when it comes to high quality of life
- The People ranking – 4th overall – has improved in 12 out of the 20 panel countries
- Ranking in top ten on all three questions that make up the Exports Index, Switzerland has bettered its Exports ranking to 6th in 2009, overtaking Canada
- Tourism dimension presents a challenge as the ranking there has slipped from 8th in 2008 to 11th this year. Panel countries further away from Switzerland rank it higher as a tourist destination than countries close by
- Switzerland's rank on Culture, still its weakest hexagon point, has dropped two places from 18th in 2008 to 20th in 2009
- Germany and China, as in 2008, are the most positive about Switzerland overall, raking it 2nd and 3rd respectively
- While Sweden still gives Switzerland low rankings, these rankings have improved for all NBI dimensions except Culture

Insights from Simon Anholt

Once again, Switzerland proves that its positive reputation is robust and enduring. One thing that's particularly impressive about Switzerland's "brand" is how strong it is beyond its own immediate neighbourhood. Plenty of countries are respected within their own region and within their own immediate sphere of influence, but few are truly 'global brands' in the way that Switzerland is: amongst Switzerland's keenest admirers are the Chinese, a situation which many of Switzerland's European competitors would give a great deal to emulate. If Switzerland can maintain and enhance its positive reputation in the developing world, it is on track to benefit from the changing macroeconomic climate in a way which few other European – or indeed Western – countries can match.

In my comments to last year's report, I mentioned the importance of a high ranking in the 'environment' stakes. Switzerland continues to score impressively in this area, and it is important that its visible commitment to reducing and mitigating climate change – in terms of real policies, investments and innovations – lives up to the very high standards that world opinion expects of the country. The Copenhagen Summit later this year is a moment when world attention will be focused on this debate, and there is a real chance that people's views on which countries are contributing most to the issue may shift. It will be interesting to see whether Switzerland's high ranking emerges from this period of reassessment in stronger or weaker shape than before.

Switzerland's weakest performance continues to be in the culture dimension. As I have mentioned before, this is certainly one of the most intensely competitive areas in which countries can compete, and a country that isn't traditionally associated with cultural wealth can't simply push its way into the Top 10 from one year to the next. But the importance of adding the cultural component to a country's image cannot be understated, and the foundations of Switzerland's future cultural reputation need to be laid today. The Chinese government is building Confucius Centres around the world at a spectacular rate; many other countries are expanding their cultural relations programmes, language teaching, exchange and scholarship programmes, arts promotion and cultural diplomacy at an unprecedented pace. This is not done for window-dressing: it is done because governments realize that respect for a country's cultural heritage, cultural attainments and cultural environment is the foundation of respect for that country's people, institutions, and ultimately its economy and its products. It is important that Switzerland isn't left behind in the race for cultural pre-eminence.



1. Overall Rankings

Overall Nation Brands Index®

Table 1.1 shows the 50 NBISM target countries in rank order based on their overall Nation Brands Index® Scores in 2009. For perspective, we have also provided their rankings in 2008. As in 2008, the 2009 rankings show a strong association between the strength of a country's overall brand and its economic status. The highest ranking countries are high income OECD members. The top 10 countries come from several continents with Western European countries forming the majority. Japan, with the 5th spot, continues to be the only Asian country to crack the top 20.

Among the top tier countries, the most notable change comes from the United States, which has moved up to the No.1 position from 7th in 2008. While most nations' reputation does not undergo major change from year to year, the U.S. has bucked the trend, due to a significant lift in its image around the world following President Obama's election. The United States has not only seen substantial improvement in its Governance and People dimensions, the general positive goodwill has also spilled over to the other dimensions including Culture and Tourism where the U.S. has recorded stronger reputation performance compared to 2008. Even with this and other ranking changes (Germany and Canada moving down the ladder), the list of top 10 nations as well as the next 9 highest nations remains identical to 2008.

The midlevel countries include emerging economy giants BRIC nations, and developing Latin American economies of Argentina and Mexico. Asian tiger Singapore has maintained its position in this midlevel pack and Egypt has improved its ranking to join this group. Large nations with emerging economies often have some very strong dimensions of their brand but lack an all-around developed brand. China, with a stronger economic performance than expected despite the global downturn, has moved up to 22nd from 28th last year. The host of the 2008 Beijing Olympics has improved its rankings for Exports, Culture, People and Tourism dimensions. However, inequality, human rights, clean government, and environment still being challenges, China places at the bottom on Governance with an even lower ranking in 2009 (49th in 2009 vs. 48th in 2008). In the Middle East, Egypt has improved rankings on several dimensions but the gap between its strong Culture showing 15th and its Governance and Exports (34th and 37th respectively) is still one of the largest for any given nation.

As discussed in the 2008 report, some regions have countries that rank very close together in the NBISM while others show a great deal of variance. For example, most Asian countries are ranked very tightly in the 30s, with South Korea, Thailand, Taiwan, and Malaysia all within 5 points of each other. On the other hand, Latin American countries range from 20th for Brazil to

47th for Colombia. Central and Eastern European countries are also fairly spread out in the rankings. At 21st, Russia leads this group which includes countries ranked in the 20s, 30s, and 40s.

With the exception of Egypt, Middle Eastern countries United Arab Emirates, Saudi Arabia and Iran are ranked in the bottom 10. They are joined at the bottom by Cuba, and Sub-Saharan countries of Kenya and Angola which are new to the NBI this year. The Baltic countries of Lithuania and Estonia as well as Ecuador are also among the bottom 10 Nation Brands, which is more a result of very limited brand exposure than strong negative perceptions, as discussed in 2008.

Table 1.1: Overall Nation Brands Index®

2009 rank		2008 rank		2009 NBI SM		2009 rank		2008 rank		2009 NBI SM	
order	order	Nation	score	order	order	Nation	score	order	order	Nation	score
1	7	United States	67.98	26	27	India	53.54				
2	2	France	67.35	27	30	Poland	53.27				
3	1	Germany	67.24	28	26	Mexico	53.21				
4	3	United Kingdom	66.70	29	28	Hungary	53.19				
5	5	Japan	66.13	30	31	Czech Republic	53.00				
6	6	Italy	66.03	31	33	South Korea	52.19				
7	4	Canada	65.98	32	36	Turkey	52.03				
8	8	Switzerland	64.78	33	34	Thailand	51.36				
9	9	Australia	64.18	34	35	Taiwan	51.31				
10	11	Spain	63.57	35	37	South Africa	50.95				
10	10	Sweden	63.57	36	38	Malaysia	50.74				
12	12	Holland	61.75	37	41	Romania	49.98				
13	13	Austria	60.58	38	38	Chile	49.79				
14	16	Scotland	59.95	39	40	Peru	49.63				
15	17	New Zealand	59.90	40	44	United Arab Emirates	49.51				
16	15	Denmark	59.57	41	43	Indonesia	48.94				
17	18	Finland	59.23	42	44	Estonia	48.33				
18	20	Belgium	58.70	43	42	Lithuania	48.26				
19	19	Ireland	58.42	44	46	Cuba	47.83				
20	21	Brazil	57.33	45	48	Saudi Arabia	47.53				
21	22	Russia	56.52	46	46	Ecuador	47.28				
22	28	China	54.29	47	n/a	Colombia	45.79				
23	24	Argentina	53.96	47	n/a	Kenya	45.79				
24	24	Singapore	53.68	49	n/a	Angola	42.54				
25	31	Egypt	53.64	50	50	Iran	39.43				

NBISM scores range from 1-100

*In 2008, Norway was 13th, Iceland 23rd, and Nigeria 49th. These countries are not included in 2009

Switzerland's NBISM Rankings

The overall rankings represent the combined views of the 20 NBISM panel countries. Switzerland has maintained its strong reputation amid global financial and economic turmoil, retaining its 8th ranking from last year. But there are variations across the 20 survey countries. Switzerland's rankings have improved in six countries, stayed the same in five countries while dropping in nine countries (mostly one place downward.) Notable improvements were recorded in India (7th) and Sweden (13th) where Switzerland ranked 10th and 16th respectively in 2008. Switzerland's ranking in Sweden has improved for five of the six NBI dimensions and stayed the same for Culture. The improved position in India is mainly boosted by better rankings in Governance and Immigration/Investment. The greatest downward change comes from Italy – three places from 10th to 13th, driven largely by lower rankings in People, Tourism and Immigration/Investment.

Table 1.2: Switzerland's NBISM Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel Countries	Switzerland's rank
Germany	2	Egypt	8
China	3	Japan	8
Poland	5	Brazil	9
South Korea	6	South Africa	9
Turkey	6	Mexico	10
Argentina	7	United States	10
Canada	7	United Kingdom	11
India	7	France	12
Russia	7	Italy	13
Australia	8	Sweden	13

NBISM rankings range from 1-50



2. Exports

Exports Index

About the Exports Dimension of the Nation Brands IndexSM:

The first point of the hexagon we look at is the Exports dimension. It is made up of three questions which address the following concepts:

- The country's contribution to innovation in science and technology
- The effect of a product or service's "country of origin" on people's attitudes towards purchasing it
- The degree to which the country is a creative place with cutting-edge ideas and new ways of thinking

Each of these addresses a key component of a country's economic strength and potential. Leadership in innovation is an important aspect of a country's economic power. This concept gets at a nation's investment in research and development and its past and present contribution to the world's progress in science and technology. The second item focuses on the change in value that is associated with a product or service coming from a particular country. Countries that do well in this dimension export well-known high quality brands. The "cutting edge" concept, measures a country's potential for future economic success. Countries that score well on this question are perceived to be dynamic and forward thinking places where creativity is encouraged.

Table 2.1 shows that as in 2008, 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.

While the list of top 10 countries is identical between 2009 and 2008, it is worth pointing out that except for the United States, all the other top countries have seen their exports scores reduced, suggesting a collective reputation hit sustained by the world's leading advanced economies in the global economic crisis.

Table 2.1: Exports Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	1	Japan	76.15	26	27	Brazil	51.37
2	2	United States	75.16	27	29	Poland	48.52
3	3	Germany	71.73	28	30	Czech Republic	47.92
4	4	United Kingdom	67.13	29	33	United Arab Emirates	47.80
5	5	France	66.69	30	32	Hungary	47.79
6	7	Switzerland	65.25	31	31	Argentina	47.57
7	6	Canada	64.91	32	33	Malaysia	47.09
8	9	Italy	62.78	33	35	Mexico	46.54
9	8	Sweden	62.58	33	38	Turkey	46.54
10	10	Australia	60.97	35	37	South Africa	46.26
11	11	Holland	58.47	36	36	Thailand	46.19
12	12	Spain	57.88	37	39	Egypt	45.45
13	17	Russia	57.23	38	41	Saudi Arabia	44.96
14	15	Finland	56.97	39	41	Indonesia	44.51
15	14	Denmark	56.55	40	40	Chile	43.81
16	16	Austria	56.42	41	44	Romania	43.48
17	21	China	55.67	42	45	Estonia	42.49
18	19	Belgium	55.63	43	43	Lithuania	42.36
19	18	South Korea	55.13	44	46	Cuba	42.26
20	20	New Zealand	54.50	45	47	Peru	41.52
21	22	Scotland	54.02	46	48	Ecuador	40.58
22	24	Ireland	53.23	47	n/a	Colombia	40.24
23	23	Singapore	52.96	48	n/a	Kenya	37.79
24	25	Taiwan	52.87	49	49	Iran	37.20
25	26	India	52.13	50	n/a	Angola	36.47

Exports scores range from 1-100

*In 2008, Norway was 13th, Iceland 28th, and Nigeria 50th. These countries are not included in 2009

In contrast, two of the emerging economy giants Russia and China not only show improved scores, but have surpassed smaller advanced economies in the rankings, Russia overtaking Finland, Denmark and Austria, and China overtaking Belgium, South Korea, and New Zealand. China's improved ranking of 17th (from 21st in 2008) is one of the highest ranks among developing countries, its reputation boosted by the strong albeit reduced GDP growth despite the global economic downturn. China, with an R&D expenditure growing even faster than the GDP according to the OECD 2009 Factbook, is seen as having made major contributions to science and technology and as a place with new ways of thinking, receiving the 5th and 13th highest scores for those questions respectively. However, China's quality of products remains a problem, as it is still China's weakest point in the Exports dimension ranking at 45th. Although

Russia has experienced a much more severe economic downturn than China, its deteriorating domestic economic conditions appear not to have affected its reputation abroad, at least not yet, in the areas of science and technology contribution, quality of products, and being a place with new ways of thinking.

Generally speaking, compared to their 2008 Exports scores, the nations that have taken a downward reputation turn are Western developed economies (aside from the U.S.), Asian tigers South Korea, Singapore and Taiwan, Central/Eastern European countries (with the exception of Romania), and some relatively affluent Latin American economies such as Argentina and Chile. Most developing countries on our list, particularly those in Asia and the Middle East including India, Indonesia, Malaysia, Thailand, Turkey, Egypt, United Arab Emirates, and Saudi Arabia, show greater scores over those recorded for 2008. In a way, the global economic crisis may have leveled the playing field somewhat for the less developed countries, as most widely reported financial turmoil took place in the developed economies and emerging economies that had relied heavily on either exports and/or free-flowing credit.

Switzerland's Export Rankings

Switzerland, one of the top ranked countries in global competitiveness according to the World Economic Forum's Global Competitiveness Report 2008-2009, has bettered its Exports ranking to 6th in 2009, overtaking Canada. Switzerland has improved its rankings in half of the panel countries and retained its ranking in nine countries. The only drop was in Japan by one place (7th in 2009 vs. 6th in 2008) which is mainly pulled down by a lower ranking recorded for the reputation of products and services. Japan now ranks France and Italy ahead of Switzerland on this question. Switzerland's Exports ranking has most notably improved in Sweden from 10th in 2008 to 6th, pulling ahead of Canada, Denmark and Finland. All panel countries rank Switzerland in the top ten for Exports, except for India, which still ranks large developing countries such as Russia and China, and its Asian business partners such as Singapore, all ahead of Switzerland.

Table 2.2: Exports - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel Countries	Switzerland's rank
Argentina	4	Italy	7
Germany	4	Japan	7
Poland	4	Mexico	7
China	5	Russia	7
Turkey	5	South Korea	7
Canada	6	United States	7
South Africa	6	Brazil	8
Sweden	6	France	8
Australia	7	United Kingdom	8
Egypt	7	India	12

Exports rankings range from 1-50

Exports: Question Rankings and Word Associations

Looking at the 20-country average, Switzerland ranks in top ten on all the questions that comprise the Export Index. Switzerland has maintained its ranking for the reputation of its products and services whereas it has fallen one place for contributions to science and technology and being a creative place with cutting edge ideas. Compared to its competitive set, its strongest area is the reputation of its products and services, yet this is even a stronger area for Germany which ranks 1st on this question. Switzerland still needs to catch up with the global power houses of Germany, the UK, and France on contribution to science and technology and creativity and cutting edge ideas. Among the competitive set Germany gets the highest ranks on all questions whereas Austria ranks the lowest for all three.

Table 2.3: Exports Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
Contributes to science and technology	9	3	4	20	6
Feel good about buying products from country	4	1	6	14	5
Creative place with cutting-edge ideas and new ways of thinking	7	3	5	16	4

Table 2.4 shows the products and services that are most associated with Switzerland and its competitive set. Although Switzerland's association with high technology is quite strong, virtually tied with France and ahead of Austria by a large margin, banking is clearly Switzerland's signature industry. With renewed global scrutiny on the banking industry, Switzerland has been and will no doubt continue to be in the limelight.

Among the competitive set, Germany leads by a convincing margin in its association with the automotive industry and high technology, both with majority votes. The UK and France have a larger variety of associations with several industries. France stands out from the competition with high associations for fashion and food while the UK has the highest associations with advertising and film and TV industries. Austria receives the lowest associations among the set and is not strongly associated with any particular industry.

Table 2.4: Exports Word Associations

Products and services associated with these countries	Switzerland %	Germany %	United Kingdom %	Austria %	France %
High technology	31	54	39	14	30
Banking	59	31	43	18	21
Automotive	10	66	34	8	39
Advertising	12	19	28	9	24
Crafts	15	14	13	14	17
Agriculture	11	16	15	14	21
Fashion	11	14	33	8	62
Food	17	21	19	14	41
Oil	*	3	8	*	3
Film and television	6	18	34	6	30

*2% or less



3. Governance

Governance Index

About the Governance Dimension of the Nation Brands IndexSM:

The second point of the hexagon we analyze is the Governance dimension. It is made up of five questions which address the following concepts:

- The country is competently and honestly governed
- The country respects the rights of its citizens and treats them with fairness
- The country behaves responsibly in the areas of international peace and security
- The country behaves responsibly to protect the environment
- The country behaves responsibly to help reduce world poverty

The first two concepts focus on a nation's domestic governance. That a country is seen as being competently and honestly governed is obviously hugely indicative of that government's reputation. The second concept assesses whether or not a government is providing its citizens with the basic rights of a free society. The last three items of the Governance dimension are directed towards a country's behavior in three areas of global policy: international peace and security, the environment, and the problem of world poverty. The final two concepts, behaving responsibly to protect the environment and to help reduce poverty, are both items that have become more and more important components of overall brand in the last few decades. We can expect these governmental responsibilities, particularly the need to have sound environmental policy, to continue to increase in importance in the future.

As in 2008, Western European countries are joined by Canada and Australia 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.

While the list of the top five "best governed" nations remains the same, Canada has overtaken Switzerland to the top, ranking 1st for three out of the five Governance questions, tied with

Switzerland for 1st on another question. France, which held the European Union presidency in the second half of 2008 and has taken a more assertive role in international diplomacy, has improved its rankings for most of the Governance questions finishing up with an overall ranking of 6th (10th in 2008).

Table 3.1: Governance Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	2	Canada	65.71	26	27	Estonia	47.88
2	1	Switzerland	65.40	27	28	Lithuania	47.47
3	3	Sweden	64.24	28	30	Romania	47.42
4	4	Germany	64.05	29	37	Turkey	47.39
5	5	Australia	63.10	30	35	Malaysia	47.26
6	10	France	62.30	31	38	United Arab Emirates	47.08
7	9	United Kingdom	62.25	32	31	Taiwan	47.05
8	7	Holland	61.71	33	31	South Korea	46.91
9	7	Denmark	61.32	34	36	Egypt	46.85
10	11	Finland	60.91	35	33	Chile	46.69
11	12	New Zealand	60.41	36	33	Mexico	46.41
12	13	Austria	60.26	37	39	Peru	45.70
13	15	Belgium	59.76	38	39	Thailand	45.69
14	14	Scotland	59.53	39	43	Russia	45.48
15	16	Spain	59.39	40	45	South Africa	45.00
16	17	Japan	58.92	41	44	Indonesia	44.71
17	18	Italy	58.62	42	46	Saudi Arabia	44.67
18	22	United States	58.16	43	41	India	44.58
19	20	Ireland	57.34	44	42	Ecuador	44.45
20	21	Hungary	52.00	45	n/a	Kenya	41.32
21	23	Poland	51.50	46	n/a	Colombia	40.51
22	25	Czech Republic	51.15	47	47	Cuba	39.80
23	23	Singapore	51.01	48	n/a	Angola	39.75
24	26	Brazil	50.33	49	48	China	38.38
25	28	Argentina	48.31	50	50	Iran	32.50

Governance scores range from 1-100

*In 2008, Norway was 6th, Iceland 19th, and Nigeria 49th. These countries are not included in 2009

The United States is now ranked 18th compared to 22nd in 2008; as Norway and Iceland which are not asked about in 2009 were ahead of the U.S. in 2008, this 18th place ranking in 2009 pulls the U.S. ahead of Ireland and Hungary. While still at the bottom of Western democracies, the U.S. however is the only Western democracy with an improved score on Governance (a 6+ point increase over 2008). All the other countries ahead of the U.S. on the rankings list have seen their scores come down in a global opinion climate that is more critical in general. The exception of the United States making significant gains in its Governance reputation is in agreement with many other surveys that have shown vast improvement in the global image of

the United States since the election of President Obama. Under the presidency of Mr. Obama, who according to a 2009 WorldPublicOpinion.org poll has the confidence of many publics around the world, the U.S. now ranks 7th for competent and honest government, and 10th for respecting the rights of its citizens and treating them with fairness, contrasting to 22nd and 21st respectively in 2008. However, the U.S. still has further room for improvement for its behavior regarding international peace and security and environmental protection, where it has moved up somewhat but still ranks behind other Western democracies at 19th and 23rd, respectively.

China, which continues to be the focus of international media scrutiny for its environmental records and human rights policy in the lead up to and after the 2008 Beijing Olympics, finds itself once again at the very bottom of the Governance list, only outscoring Iran. India, the world's largest democracy, also has a low ranking at 43rd, behind all its Asian counterparts except China. Both China and India, combative with advanced economies in global climate discussions, do not appear to have global public opinion support as they continue to have rock-bottom reputations when it comes to protecting the environment, ranking 49th and 47th, respectively. However, the Indian public, countering global opinion, ranks its own country 4th most positive and gives China a ranking of 38th for behaving responsibly to protect the environment, ahead of some other medium sized developing countries such as Turkey and Peru.

As in 2008, the former communist countries of Central and Eastern Europe place in the middle of the Governance list. In the Middle East we see that Turkey now ranks 29th, mainly boosted by improved rankings for being competently and honestly governed and behaving responsibly in the areas of international peace and security. The United Arab Emirates, which held their first parliamentary election in 2006, has also improved its Governance ranking of 38th in 2008 to 31st this year.

Other notable ranking improvements include Russia from 43rd in 2008 to 39th in 2009, primarily driven by better rankings for having a competent and honest government, for respecting the rights of its citizens and for behaving responsibly in the areas of international peace and security, particularly in Canada, Germany, India, and Mexico. Malaysia, having made attempts to relax domestic political control (inconsistent as they may be), sees an improved ranking from 35th to 30th, with particular gains among its Asian neighbors. And South Africa, which recently held a peaceful election with major voter turnaround, has moved up from 45th to 40th.

Switzerland's Governance Rankings

As mentioned earlier, governance scores have declined for almost all Western democracy nations and Switzerland is no exception. And Switzerland has taken a stronger hit than Canada which has moved ahead to take the No. 1 spot.

Table 3.2 shows that all panel countries except France, Sweden, and the United States rank Switzerland in the top 5 for governance, and it receives top 3 rankings from two thirds of the panel countries. Switzerland's rankings have stayed the same in seven out of the 20 panel countries, in seven the rankings have improved, and in six countries including Poland, Russia, Italy, and the U.S., they have worsened. India has moved Switzerland up 4 places to 5th, ranking ahead of Canada, France, Germany, Australia and Singapore.

Table 3.2: Governance - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel countries	Switzerland's rank
Argentina	1	Egypt	3
Germany	1	South Africa	3
Japan	1	Turkey	3
South Korea	1	Australia	4
Brazil	2	United Kingdom	4
Canada	2	India	5
China	2	Italy	5
Mexico	2	France	6
Poland	2	Sweden	7
Russia	2	United States	7

Governance rankings range from 1-50

Governance: Question Rankings and Word Associations

Switzerland has maintained its ranking at 1st for respecting the rights of its citizens and treating them with fairness, and for behaving responsibly to protect the environment. This year, Switzerland is placed behind Canada for being competently and honestly governed and for behaving responsibly in international peace and security. On the question of behaving responsibly to help reduce world poverty, Switzerland has fallen by three places to 5th position from 2nd last year. Switzerland trails Germany, Sweden, and the UK on this question which it tied for second place in 2008. Among the comparison set, Switzerland leads on four of the five questions that make up the Governance dimension and pulls ahead of France and Austria for behaving responsibly to reduce world poverty.

Table 3.3: Governance Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
Competently and honestly governed	2	3	6	15	8
Respects the rights of citizens and treats them with fairness	1	4	5	12	7
Behaves responsibly in the areas of international peace and security	2	4	7	12	6
Behaves responsibly to protect the environment	1	4	12	11	10
Behaves responsibly to help reduce world poverty	5	2	3	12	6

Table 3.4 shows that all the countries in the competitive set share a very similar profile. All the countries are seen as reliable, trustworthy, and reassuring. Switzerland's only negative association is unpredictable chosen by 5% of the respondents and is the lowest among the comparison set. Both Switzerland and Austria receive no mentions for dangerous, corrupt or unstable while the bigger countries in the set Germany, the UK, France are associated by 3 or 4% with these negative adjectives.

Table 3.4: Governance Word Associations

Adjectives that most accurately describe the government	Switzerland	Germany	United Kingdom	Austria	France
	%	%	%	%	%
Reliable	28	29	25	23	25
Unpredictable	5	8	8	7	10
Transparent	9	7	7	8	8
Trustworthy	23	20	20	19	18
Dangerous	*	3	4	*	3
Corrupt	*	3	4	*	4
Reassuring	12	10	10	11	10
Unstable	*	3	4	*	3

*2% or less



4. Culture

Culture Index

About the Culture Dimension of the Nation Brands IndexSM:

The culture point of the hexagon is made up of three questions covering the following concepts:

- The country excels at sports
- The country has a rich cultural heritage
- The country is an interesting and exciting place for contemporary culture such as music, films, art and literature

The first question in this dimension focuses entirely on one of the widely recognized expressions of modern culture – sports. Countries that have had success in the Olympic Games and in international soccer competitions tend to have the highest ratings for sports. The second concept, having rich cultural heritage, focuses on the depth and richness of a country's cultural history. This dimension is strongly associated with the antiquity of the nation, where countries with older civilizations fare better. The final concept, contemporary culture, gets at both modern mass media culture as well "high culture" reputations.

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

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 1st, 3rd, and 6th respectively. On the other hand, Russia with athletes finishing in the top rankings at the Olympic Games and in international competitions, and Brazil with its world famous football prowess gets their best scores for excelling at sports, ranking 3rd and 4th, respectively. Smaller or less visible developing countries, despite their rich cultural heritage, do not break through to the top half of the rankings. For example, Latin American and Asian

countries with deep and vibrant indigenous cultures and/or fantastic historic monuments, such as Peru, Thailand, and Indonesia, find themselves in the bottom third of the list.

Table 4.1: Culture Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	1	France	70.07	26	28	Turkey	54.45
2	2	Italy	69.88	27	27	Finland	53.95
3	5	United States	69.80	28	31	South Africa	53.69
4	3	United Kingdom	68.04	29	29	Czech Republic	53.66
5	4	Germany	67.63	30	30	Poland	53.46
6	6	Spain	66.02	31	33	South Korea	52.89
7	9	China	65.32	32	32	Hungary	52.82
8	8	Japan	65.11	33	34	Romania	52.34
9	7	Russia	65.04	34	35	Cuba	51.97
10	10	Brazil	62.10	35	36	Peru	51.02
11	11	Australia	60.47	36	37	Thailand	50.95
12	12	Canada	59.90	37	n/a	Kenya	50.05
13	14	Holland	58.90	38	39	Chile	49.93
14	13	Sweden	58.54	39	40	Singapore	48.60
15	18	Egypt	58.01	40	44	Malaysia	48.36
16	15	Austria	57.94	41	42	Indonesia	48.31
17	20	India	57.76	42	43	Taiwan	48.29
18	16	Scotland	57.57	43	41	Lithuania	47.86
19	17	Argentina	57.55	44	45	Estonia	47.54
20	18	Switzerland	56.83	45	46	Ecuador	47.46
21	21	Mexico	56.39	45	n/a	Colombia	47.46
22	22	Ireland	55.97	47	48	Saudi Arabia	46.76
23	24	Denmark	55.14	48	49	United Arab Emirates	46.61
24	26	Belgium	54.74	49	50	Iran	44.05
25	25	New Zealand	54.68	50	n/a	Angola	43.59

Culture scores range from 1-100

*In 2008, Norway was 23rd, Iceland 38th, and Nigeria 47th. These countries are not included in 2009

Culture rankings for the top 10 countries are very similar to their showings in 2008, with a couple of exceptions. China, after successfully hosting the Olympics in 2008 with world leading medal counts and enthusiastic local support, has improved its already strong showing of sports excellence from 8th to 5th, contributing to the improvement of its overall Culture ranking (9th in 2008 to 7th in 2009). The U.S. has jumped from being 5th on this dimension last year to 3rd this year, boosted by uplift in the perception of its cultural heritage (26th in 2009 vs. 33rd in 2008).

The Culture rankings for the rest of the nations have remained very stable. India is one other exception. India has improved its Culture ranking from 20th in 2008 to 17th in 2009 by enhancing its place on contemporary culture from 11th to 8th. Kenya, which is new to the 50 nation list in 2009, sits at 38th, by far its best score across all dimensions. Kenya, known chiefly

for its dominance in middle-distance and long-distance running, ranks 17th for excelling at sports. However, despite having rich and diverse indigenous cultures, and an extensive and dynamic music scene, it places in the bottom five for cultural heritage and contemporary culture, reflecting a lack of global awareness in these areas.

Switzerland's Culture Rankings

Switzerland's rank for the Culture Index is its weakest hexagon point at 20th. With India and Egypt pulling ahead of Switzerland this year, it has dropped two places from 18th in 2008 to 20th in 2009. All the panel countries except for France rank Switzerland in the top half of the Culture dimension. The rankings have improved or stayed the same in Western European and North American panel countries, with the exception of Italy. Although slightly more positive towards Switzerland this year, the Western European neighbors still rank the country lower than the average among 20 panel countries.

Table 4.2: Culture - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel countries	Switzerland's rank
Canada	14	Russia	18
Germany	14	Brazil	19
Turkey	14	China	20
India	16	Egypt	20
Japan	16	Argentina	21
Mexico	16	South Africa	23
South Korea	16	United Kingdom	23
United States	16	Italy	25
Australia	18	Sweden	25
Poland	18	France	26

Culture rankings range from 1-50

Culture: Question Rankings and Word Associations

Looking at the individual culture questions we see that Switzerland's strongest attribute is contemporary culture, with a 16th place which is unchanged from last year. Switzerland has dropped 2 places to 22nd for sports excellence while falling 3 places to 18th for having a rich cultural heritage. For sports excellence Switzerland now ranks behind Czech Republic and South Korea which it tied last year. On the concept of having a rich cultural heritage, Switzerland now ranks behind Peru and Ireland, which it tied last year, as well as Holland which trailed Switzerland last year. Among the competitive set, Germany leads the group for excelling at sports and France for having a rich cultural heritage and being an interesting place for contemporary culture.

Table 4.3: Culture Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
This country excels at sport	22	2	8	18	7
This country has a rich cultural heritage	18	9	7	15	4
Interesting and exciting place for contemporary culture such as music, films, art, and literature	16	5	4	12	2

Table 4.4 demonstrates that three in 10 respondents associate Switzerland with museums while a quarter of the respondents associate it with modern design. Yet, these mentions, strongest for Switzerland, are not distinguishing cultural trademarks as Germany, the UK, and France get higher associations in both areas. Additionally, about one third (35%) say “none of these” associations come to mind when thinking of Switzerland, highest within the competitive set. Switzerland and Austria have quite similar culture profiles, with Austria besting Switzerland in opera and music. Among the group Germany outcores all of its comparison countries with the strongest association with sports while the UK leads the pack for pop videos and music, and France for sculpture and films.

Table 4.4: Culture Word Associations

Cultural activity or product most expected to be produced in this country	Switzerland %	Germany %	United Kingdom %	Austria %	France %
Opera	16	27	28	27	34
Pop Videos	10	20	36	8	22
Circus	8	14	15	9	19
Sculpture	18	24	26	19	37
Museums	31	43	50	32	55
Street Carnival	10	16	15	10	19
Films	14	30	41	13	45
Sports	16	42	39	15	34
Modern design	24	31	32	13	38
Music	14	30	44	22	37

*2% or less



5. People

People Index

About the People Dimension of the Nation Brands IndexSM:

The people point of the hexagon is made up of three questions which get at the perceptions of the people of a country from three different perspectives:

- If I visited the country, the people would make me feel welcome
- I would like to have a person from the country as a close friend
- A well-qualified person from the country would be a valuable employee

The questions that comprise this dimension get at three different important aspects of a country's people. The first concept – how welcoming the people of a country are – gets at a country's overall friendliness and manners. It expands beyond tourism to serve as an indicator of what the experience of interacting with the people of that country is generally like. The second concept goes beyond manners, encompassing characteristics that we want in our close friends – fun, loyal, interesting, and in many cases, sharing our interests. The last concept assesses whether the people of a country would be valuable assets as employees. The responses to this question relate to preconceived notions of the intelligence, competence, and work ethic of a country's people.

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 but this year Chile has moved down a few positions, surpassed by a few countries such as Turkey, Malaysia, South Korea, and China. Colombia, new this year to the NBI, ranks 47th on the 50 nation list, with positions below 45th in all the panel countries except for Argentina, China, Japan, Mexico, South Korea, and Turkey.

Table 5.1: People Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	1	Canada	68.26	26	27	Hungary	58.20
2	2	Australia	66.68	27	31	Russia	58.01
3	3	Italy	66.53	28	32	Egypt	57.85
4	5	Switzerland	65.93	29	29	Thailand	57.81
5	13	United States	65.85	30	29	Czech Republic	57.76
6	6	United Kingdom	65.61	31	34	South Africa	56.99
7	4	Sweden	65.54	32	37	Turkey	56.82
8	8	Spain	65.41	33	38	Malaysia	56.81
9	8	Japan	65.23	34	33	Taiwan	56.51
10	7	Germany	65.16	35	41	China	56.16
11	11	France	64.85	36	35	Peru	56.15
12	10	New Zealand	64.32	37	39	South Korea	55.76
13	12	Holland	64.15	38	35	Chile	55.72
14	15	Scotland	63.19	39	41	Romania	55.54
15	18	Austria	62.74	40	41	Indonesia	55.42
16	18	Finland	62.57	41	40	Cuba	55.17
17	20	Brazil	62.54	42	45	Ecuador	54.53
18	17	Ireland	62.50	43	44	Lithuania	54.40
19	16	Denmark	62.05	44	46	Estonia	54.32
20	21	Belgium	61.89	45	n/a	Kenya	53.98
21	23	Argentina	59.36	46	47	United Arab Emirates	53.97
22	24	Mexico	59.00	47	n/a	Colombia	52.73
23	26	India	58.74	48	48	Saudi Arabia	52.04
24	25	Singapore	58.65	49	n/a	Angola	50.92
25	28	Poland	58.23	50	50	Iran	44.90

People scores range from 1-100

*In 2008, Norway was 14th, Iceland 22nd, and Nigeria 49th. These countries are not included in 2009

Among the top 10 ranked countries, Sweden has lost positions to Switzerland, the U.S. and the UK; Germany also has moved downwards in the rankings. The United States shows the biggest change for any country on any dimension with a dimension ranking of 5th this year from 13th in 2008. Twelve out of the 20 panel countries rank the U.S. in their top 10 this year compared to only eight in 2008 and the U.S. ranks below 20 only in, ironically, a major aid recipient country Egypt (26th) and its southern neighbor Mexico (22nd). The U.S has improved its rankings for all three questions on this dimension with a substantial change on welcoming people (16th in 2009 vs. 25th in 2008). Although the U.S. and France both have improved reputations in Governance as discussed earlier, France, unlike the U.S., still ranks low on the People Index relative to its rankings in the other dimensions, mostly due to their persistent reputation of not being welcoming to outsiders: its low 19th position on the welcoming aspect remains unchanged.

China has made great strides in its People ranking, from 41st last year to 35th this year. Egypt, India, and Russia remain to be China's strongest supporters, ranking China 8th, 21st and 23rd,

respectively. However, with the recent incidents involving the Uighur Muslim minority and members of China's dominant Han ethnic group, China's ranking in Turkey has dropped to 49th from 23rd in 2008. Russia, despite an improved place at 27th compared to 31st last year, shows volatile rankings across panel countries. Russia receives its strongest rankings from India (12th), Turkey (15th), Mexico (18th) and China (24th) but ranks 35th or lower in France, Germany, Japan, Poland, Sweden, UK and US.

Switzerland's People Rankings by 20 Panel Countries

Switzerland has moved up its people ranking to 4th while fourth place Sweden in 2008 is now placed 7th. Switzerland has improved its ranking in 12 out of the 20 panel countries. Most notably, Switzerland has moved up 5 places in China and 7 places in Turkey, mainly boosted by improved perceptions in Swiss being welcoming people and good for close friendships. Although Switzerland's people rankings have improved in Western European countries except for Italy, they still have the least positive perception of Switzerland, ranking it 11th or lower in this dimension.

Table 5.2: People - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel countries	Switzerland's rank
China	2	Russia	7
Germany	2	South Africa	7
South Korea	3	Australia	8
Argentina	4	Egypt	9
India	6	Japan	9
Turkey	6	United Kingdom	11
Brazil	7	United States	11
Canada	7	France	14
Mexico	7	Sweden	15
Poland	7	Italy	19

People rankings range from 1-50

People: Question Rankings and Word Associations

Switzerland places among the top 10 for all three questions that make up the People Index, its highest ranking coming from respondents' willingness to employ a well-qualified person. Switzerland is the only country among the competitive set that ranks in top 10 for all three questions. With an 8th rank unchanged from last year for welcoming people, Switzerland outscores all comparison countries for this question; Germany and France trail behind Switzerland at a distance. Germany leads the group for well-qualified employees while the UK has the lead for likely close friendships.

Table 5.3: People Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
People would make you feel welcome	8	21	13	15	19
Like to have a person from this country as a close friend	8	10	5	18	6
Willing to employ a well-qualified person from this country	5	1	5	12	7

Table 5.4 shows that nearly all panelists use positive adjectives to describe the Swiss. About one third of the panelists think of the Swiss as being honest (leading the pack of five countries), hard-working, or skillful. These three adjectives are also more or less common associations for all of the comparison countries. One in four thinks of the Swiss as being rich, an association that goes along with the high per capita income and the country's strong banking reputation. Germans get the highest associations of the group as being hard-working and skillful but they are also associated by one in 10 as being aggressive. One in five sees French as being fun and one in 10 as being lazy.

Table 5.4: People Word Associations

Adjectives that describe the people of each country	Switzerland %	Germany %	United Kingdom %	Austria %	France %
Honest	29	26	23	23	19
Hard-Working	33	42	26	28	22
Lazy	*	3	7	3	9
Ignorant	3	3	5	*	5
Unreliable	4	5	7	4	7
Skillful	31	38	29	23	28
Fun	10	10	15	10	19
Tolerant	15	12	16	12	14
Rich	27	20	23	12	20
Aggressive	*	11	7	3	7

*2% or less



6. Tourism

Tourism Index

About the Tourism Dimension of the Nation Brands IndexSM:

The tourism point of the hexagon is made up of four questions which measure several concepts that indicate the strength of a country's brand as a tourist destination:

- Would like to visit the country if money were no object
- The country is rich in natural beauty
- The country is rich in historic buildings and monuments
- The country has a vibrant city life and urban attractions

The first component of the tourism hexagon point measures a country's tourism potential by asking panelists to evaluate their interest in tourist destinations without considering the practical restraints of distance and cost. The following three questions address the three most important qualities that vacationers look for in a destination. The natural beauty of a country can refer to great beaches, pristine wilderness, serene farmland, natural wonders, or any variety of landscapes that make a location desirable. The ancient ruins, architectural feats, and historic landmarks that make certain countries prime tourism locales are included in the historic buildings and monuments concept. The third question assesses the contribution of a nation's cities to its tourism brand image.

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 we will discuss later. 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.

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. New Zealand, for example, is in the top 10 countries panelists would like to visit if money were no object, despite ranking 36th and 24th for having historic buildings and a vibrant city life. Of course, this is due to New Zealand's unmatched mountains and wilderness, captured by its 2nd place ranking for natural beauty.

Table 6.1: Tourism Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	1	Italy	75.64	26	27	Finland	62.75
2	2	France	74.45	27	28	Belgium	62.49
3	3	Spain	72.14	28	31	Turkey	61.80
4	6	United States	71.57	29	29	Peru	61.05
5	4	United Kingdom	71.24	30	30	Singapore	60.52
6	5	Australia	69.99	31	37	Malaysia	59.50
7	7	Canada	69.70	32	33	Hungary	59.41
8	8	Japan	69.56	33	38	South Africa	59.36
9	10	Germany	69.28	34	35	Czech Republic	59.04
10	10	Egypt	69.19	35	36	Poland	58.91
11	8	Switzerland	69.14	36	34	Chile	58.45
12	13	Brazil	67.56	37	39	Indonesia	58.23
13	12	Scotland	67.26	38	40	Cuba	57.18
14	14	Sweden	66.84	39	41	Taiwan	56.99
15	15	Austria	66.58	40	42	Romania	56.61
16	16	New Zealand	66.48	41	43	South Korea	55.93
17	18	Holland	66.46	42	44	Ecuador	55.54
18	19	Ireland	65.41	43	n/a	Colombia	54.58
19	21	China	65.27	44	47	United Arab Emirates	54.03
20	17	Mexico	65.13	45	n/a	Kenya	53.91
21	22	Russia	64.61	46	46	Estonia	53.67
22	24	India	64.25	47	45	Lithuania	53.59
23	25	Thailand	63.29	48	48	Saudi Arabia	52.52
24	23	Denmark	63.26	49	n/a	Angola	48.27
25	26	Argentina	62.82	50	50	Iran	45.48

Tourism scores range from 1-100

*In 2008, Norway was 20th, Iceland 32nd, and Nigeria 49th. These countries are not included in 2009

In general, most countries have a great deal of variance in their rankings on the various Tourism questions. Japan's overall rank at 8th is boosted by a 5th place ranking for having vibrant city life although it ranks 23rd for natural beauty. Germany's tourism strength comes from having vibrant city life (ranked 7th) and being rich in historic buildings (ranked 9th). Not surprisingly, Egypt, famous for its ancient civilization and some of the world's most famous

monuments, ranks 1st for being rich in historic buildings while placing at 30th for having vibrant city life.

There are some notable changes in rankings on the Tourism dimension. Mexico, one of the hardest hit countries by the influenza outbreak, has seen its ranking move down from 17th in 2008 to 20th in 2009. Malaysia, which recently ranked fourth in terms of value-for-money destinations by the World Economic Forum in its Travel & Tourism Competitiveness Report (TCR) 2009, has jumped from 37th in 2008 to 31st in 2009, helped by visible advertising that emphasize cost-efficient travel, good infrastructure, and attractions such as "medical tourism." South Africa has moved from 38th last year to 33rd in 2009, thanks to a focused international marketing campaign and infrastructure that is well developed for the region.

Switzerland's Tourism Rankings

Ranking 11th, Switzerland just misses the top ten of the 50 nations. And its relative position has slipped 3 places vs. 2008, indicating that competition has gotten stronger, as Germany and Egypt move ahead of Switzerland in the rankings.

Interestingly, panel countries further away from Switzerland such as China, India, and South Korea rank it much higher as a tourist destination than countries close by such as Italy and France. This pattern was true in 2008 as well. Switzerland's rankings have improved in only six countries; in ten countries including Canada and Japan, it has lost positions. China, the fastest growing and largest outbound travel market, continues to give Switzerland top ranks on wanting "to visit if money was no object" (1st) and "rich in natural beauty" (2nd).

Table 6.2: Tourism - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel countries	Switzerland's rank
China	2	Japan	10
India	3	United States	10
South Korea	4	Brazil	11
Turkey	6	Mexico	12
South Africa	7	Poland	12
Egypt	8	Argentina	13
Russia	8	United Kingdom	13
Australia	10	Sweden	19
Canada	10	France	25
Germany	10	Italy	27

Tourism rankings range from 1-50

Tourism: Question Rankings and Word Associations

In 2008, Switzerland's tourism strength was based on two component questions: "Want to visit if money was no object" and "Rich in natural beauty". While "natural beauty" has held its ranking constant at 4th vs. 2008, the desire to visit if "money was no object" sank to 7th from 4th; perhaps money does weigh more in the sub-consciousness of consumers in a global recession, particularly when thinking about relatively expensive places like Switzerland.

Switzerland's famous natural beauty trumps all four comparison nations; even nearby Austria which shares similar alpine majesty trails Switzerland by 9 places. While Switzerland has held its natural beauty rank position year-to-year, Germany has slipped five positions and the UK one, while Austria and France remain unchanged. Desire to visit, Switzerland's other tourism strongpoint, has moved downward by three places while Austria has gained two spots and France has held steady; the UK and Germany each has lost one rank position. For "vibrant city life", Switzerland still trails all competitors except for Austria which has dropped from 13th to 15th this year. "Rich in historic buildings and monuments" remains Switzerland's weakest tourism element.

Table 6.3: Tourism Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
Strongly like to visit if money was no object	7	11	8	16	4
This country is rich in natural beauty	4	28	24	13	8
This country is rich in historic buildings and monuments	17	9	4	13	3
This country has a vibrant city life and urban attractions	12	7	4	15	2

Switzerland evokes five major descriptive associations, all of which are positive: "fascinating", "relaxing", "exciting", "educational", and "romantic". The one concept that Switzerland "owns" is "relaxing" where it outscores the four comparison countries by good margins. France dominates in being "romantic" and "fascinating" and also leads for "exciting". Germany and the UK have the highest "educational" imagery in the group. Looking at Switzerland's strong point, "relaxing", the countries that give highest marks for this feature are very diverse: Germany, India, Egypt, South Africa, Japan, Australia, and Canada.

Table 6.4: Tourism Word Associations

Adjectives that describe the experience of visiting each country	Switzerland	Germany	United Kingdom	Austria	France
	%	%	%	%	%
Romantic	23	12	16	20	47
Depressing	*	4	4	*	*
Exciting	25	25	28	20	31
Boring	6	8	6	6	4
Fascinating	29	28	30	25	37
Risky	3	4	5	4	3
Educational	24	35	35	24	31
Stressful	*	5	6	*	4
Spiritual	6	5	6	5	8
Relaxing	26	12	14	18	20

*2% or less



7. Immigration/Investment

Immigration/Investment Index

About the Immigration/Investment Dimension of the Nation Brands IndexSM:

The immigration/investment point of the hexagon measures the potential of a country as a place to live, work, study, and invest in. This dimension asks about five components of a country's potential for immigration and investment:

- Willingness to live and work for a substantial period in the country
- Quality of life
- Good place to study for educational qualifications
- The country has businesses I'd like to invest in
- Equal opportunity

The component questions of this hexagon point are designed to capture a country's power to attract talent and capital through immigration and investment. With most international migration being primarily motivated by work or educational opportunities, the first and third questions reflect a potential immigrant's interest and willingness to move to a foreign country for a substantial period of time. The quality of life in a nation and its equal opportunity are also central concerns for anyone contemplating living in a new country. The final aspect of this dimension measures the perception of a country's economic prosperity and business opportunity, both powerful draws on human capital and financial investment.

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.

Following Canada, the top group is composed of several English speaking or Western European countries with strong economic outlooks. As in 2008, despite continued policy debate and volatile public opinion regarding immigration, U.S., the UK, France, Germany, along with Canada and Switzerland, lead the world as the most attractive destinations for 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 16th 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 (China ranks 41st and 48th, respectively).

Table 7.1: Immigration/Investment Index

2009 rank order	2008 rank order	Nation	2009 NBI SM score	2009 rank order	2008 rank order	Nation	2009 NBI SM score
1	1	Canada	67.41	26	28	Argentina	48.17
2	2	United States	67.36	27	29	United Arab Emirates	47.58
3	4	Switzerland	66.14	28	30	South Korea	46.55
4	2	United Kingdom	65.93	29	32	Taiwan	46.18
5	6	France	65.75	30	31	Mexico	45.79
6	5	Germany	65.59	31	35	Malaysia	45.43
7	7	Australia	63.85	32	36	Turkey	45.20
8	8	Sweden	63.65	33	33	China	44.94
9	9	Italy	62.72	34	44	Romania	44.51
10	10	Japan	61.79	35	43	Egypt	44.46
11	11	Holland	60.82	36	41	South Africa	44.41
12	12	Spain	60.57	37	41	Saudi Arabia	44.24
13	15	Austria	59.52	38	39	Thailand	44.22
14	13	Denmark	59.09	39	39	Chile	44.11
15	15	New Zealand	58.99	40	38	Estonia	44.09
16	18	Finland	58.23	41	36	Lithuania	43.89
17	17	Scotland	58.10	42	34	India	43.79
18	19	Belgium	57.66	43	45	Indonesia	42.45
19	20	Ireland	56.07	44	45	Peru	42.37
20	22	Singapore	50.36	45	47	Ecuador	41.15
21	23	Brazil	50.09	46	48	Cuba	40.57
22	26	Poland	49.00	47	n/a	Colombia	39.20
23	24	Hungary	48.91	48	n/a	Kenya	37.68
24	25	Russia	48.75	49	n/a	Angola	36.25
25	27	Czech Republic	48.48	50	50	Iran	32.46

Immigration/Investment scores range from 1-100

*In 2008, Norway was 14th, Iceland 21st, and Nigeria 49th. These countries are not included in 2009

The United Arab Emirates, which has been aggressively courting western educators and experts, hits its highest mark of all six NBI hexagons ranking 27th for this dimension, led by its 19th place ranking for having promising businesses and 20th place ranking for quality of life.

The 2009 rankings for the developed nations that make the top 20 of the Immigration/Investment list have remained quite stable with a couple of the countries swapping places. On the other hand, there are some notable changes in the rankings of the countries that make the bottom 20 of the list, specifically the rankings of the countries in the 30s.

The rankings for the Baltic nations of Estonia and Lithuania, with bank failures and plunging currencies, have dropped from 38th and 36th to 40th and 41st, respectively. On the other hand, Romania, a visible and attractive destination for international investors, as a result of its recent EU membership and due to rapid development of IT outsourcing services, now ranks 34th compared to 44th in 2008. Particular improved rankings for Romania come from Latin American panel countries as well as Canada, Sweden, and South Africa. Poland, which according to the World Bank country brief 2009 has fared better than other countries in the region during the global financial crisis, has improved its ranking from 26th in 2008 to 22nd in 2009.

In Asia Pacific we see that Malaysia, which according to World Bank Doing Business 2008 report ranked 24 out of 178 economies for ease of doing business, betters its ranking to 29th (36th in 2008) for its businesses opportunities and places at 31st (35th in 2008) on Immigration/Investment. Malaysia also ranks 24th or better for educational qualifications in the developing countries of China, India and Egypt, reflecting the attractiveness of affordable training to less affluent populations, and targeted promotion by Malaysian government and education institutions. India's Immigration/Investment ranking is negatively affected this year changing from 34th in 2008 to 42nd. India, in the aftermath of the terrorist attacks in Mumbai, ranks 36th in 2009 vs. 30th in 2008 for people's willingness to work and live there and 44th in 2009 vs. 41st in 2008 for equal opportunity, particularly losing ground in Russia and Argentina.

Switzerland's Immigration/Investment Rankings

Switzerland, ranked 3rd, has surpassed the United Kingdom in Immigration/Investment. This is not surprising given how the two countries have fared so differently in the global financial crisis, largely due to their vastly different investment practices, banking industries, as well as tax conditions. In fact, as we will discussed later in the report, Switzerland is seen as least negatively affected by the global financial crisis and is among the leading contributors to the global effort to overcome the crisis. The UK on the other hand is among the most negatively affected.

In a rare display of global agreement, all 20 survey countries place Switzerland within the top eight ranks for Immigration/Investment. Seldom does a nation's signature image have this level of consensus. Switzerland has seen its ranking improve in seven countries. Sweden, although still giving Switzerland the lowest ranking of all survey countries, has moved Switzerland up 4 places compared to 2008.

Table 7.2: Immigration/Investment - Switzerland's Rankings by 20 Panel Countries

Panel countries	Switzerland's rank	Panel countries	Switzerland's rank
China	1	India	4
Poland	1	Mexico	5
Germany	2	South Africa	5
Argentina	3	South Korea	5
Egypt	3	United States	5
France	3	Australia	6
Russia	3	United Kingdom	6
Turkey	3	Japan	7
Brazil	4	Italy	8
Canada	4	Sweden	8

Immigration/Investment rankings range from 1-50

Immigration/Investment: Question Rankings and Word Associations

All of the five questions that make up the immigration/Investment dimension are very positive for Switzerland, having ranks ranging from 1st to 6th. Germany bests Switzerland in attractive business investment and educational opportunities. The UK leads the comparison countries in education, which remains to be Switzerland's weakest rank. Among the 5 countries, Switzerland has the best rank for two questions: "high quality of life" and "cares about equality in society." Even though Switzerland ranks relatively low on "willing to work/live there" compared to its other rankings in the dimension, it actually has left the UK behind this year whereas the two countries were tied in 2008.

Table 7.3: Immigration/Investment Question Rankings

Concept	Switzerland	Germany	United Kingdom	Austria	France
Willing to live and work for a substantial period in this country	5	10	7	13	4
High quality of life	1	5	7	13	3
Good place to study for educational qualifications	6	3	2	11	4
Has businesses I'd like to invest in	4	3	6	13	7
Cares about equality in society	3	4	4	11	7

Switzerland does very well on the Immigration/Investment adjective imagery battery. For the three main positive words ("forward thinking", "ambitious", "modern"), Switzerland is competitive with the levels of the four comparison nations, which include strong economic players. Further, Switzerland has low levels for the negative word associations. What is interesting however is that in 2008 there was virtually no mention of "declining" for Switzerland while all other comparison countries garnered some mentions of this adjective. In 2009, even

Switzerland has not escaped this negativity. Conversely, the mention of “modern” has decreased for Switzerland (32% in 2008 to 28%), just as it has for Germany (31% to 28%), and for the UK (30% to 26%). This is consistent with our discussions earlier that the reputation of most advanced economies has been weakened by the global economic crisis.

Table 7.4: Immigration/Investment Word Associations

Adjective that describes each country's current economic and business conditions	Switzerland	Germany	United Kingdom	Austria	France
	%	%	%	%	%
Backward	*	*	3	*	*
Developing	8	8	7	11	7
Forward-Thinking	19	20	17	15	18
Ambitious	10	11	9	8	10
Modern	28	28	26	24	29
Declining	3	5	8	3	6
Isolated	3	*	*	*	*
Stagnant	5	6	8	7	7

*2% or less

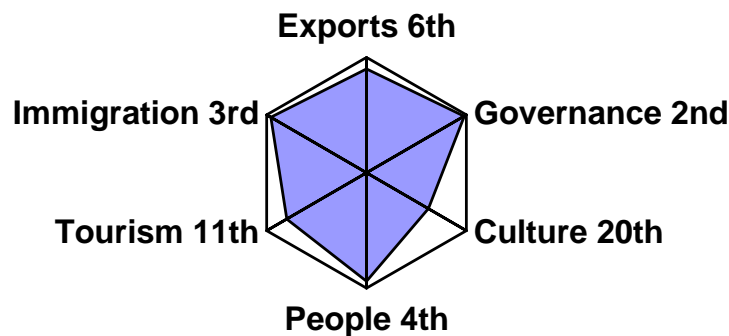


8. Overall Brand Assessment

How the World Sees Switzerland

The world is experiencing political and economic upheaval on a scale not experienced for decades. Weathering the storm, Switzerland's brand continues to be very highly-rated and relatively stable, holding on to its eighth-place ranking overall.

The 2009 Nation Brand Hexagon® diagram below shows that Switzerland continues to have a successful and fairly balanced brand, rating as a top twenty country on every dimension.

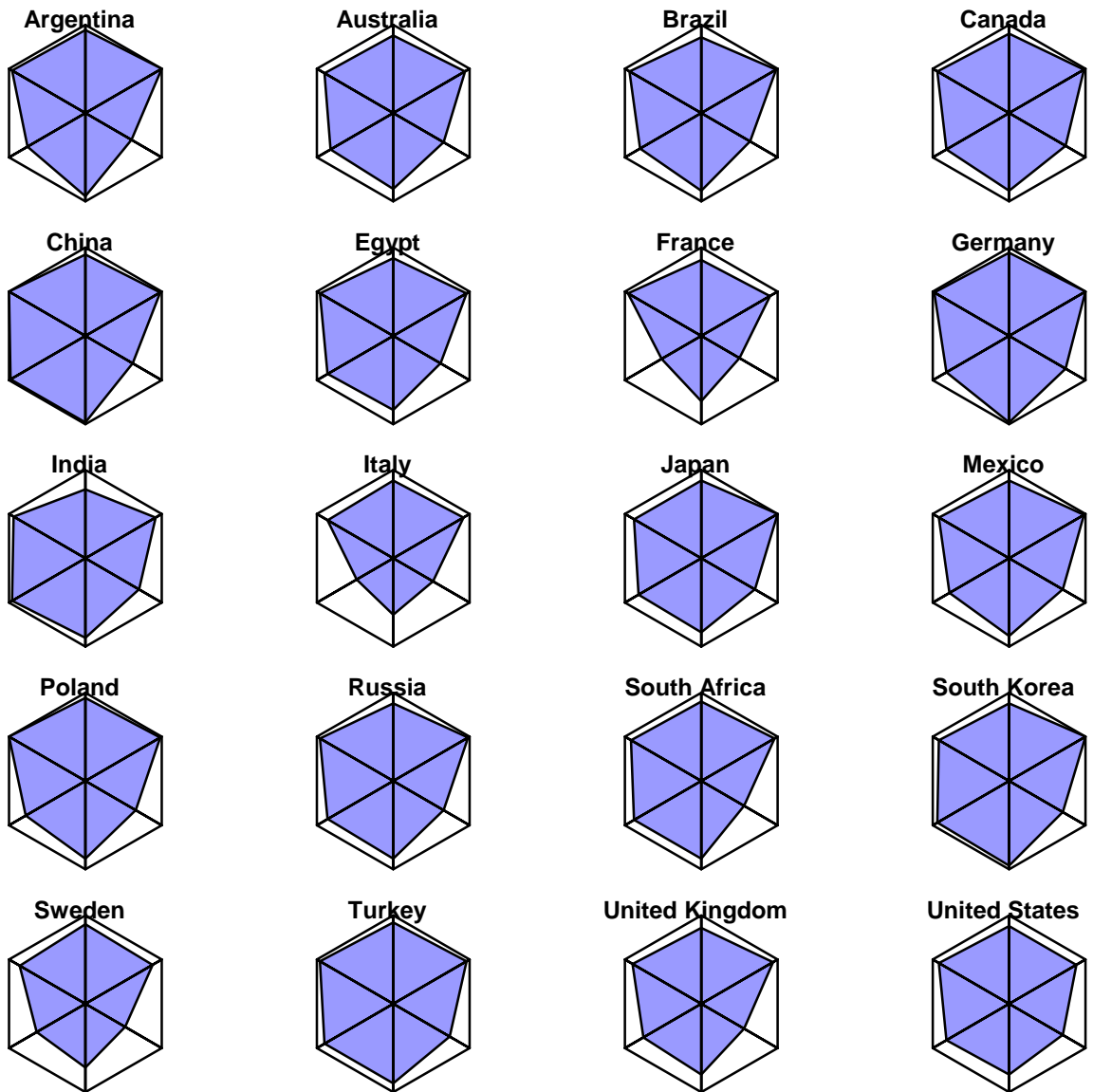
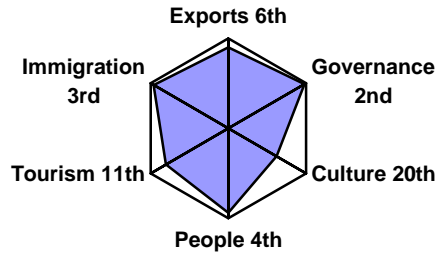


The Nation Brand Hexagon
© 2000 Simon Anholt

A particular strength is the perception that Switzerland is one of the two best governed countries in the world. Canada edged out Switzerland for the top spot in 2009. However, Switzerland is also seen as one of the top six countries when it comes to attracting top talent and investment, welcoming and employable people, and the quality of exports – which are all up one position from 2008. All four of these dimensions – Governance, Immigration, People and Exports – continue to be major and stable strengths for Brand Switzerland as it competes on the global stage against much larger countries and during a time of watershed change.

As noted, Switzerland is rated as a top 20 country on all six dimensions which comprise nation brands. However, the downward trend in the 2009 ratings of Switzerland on Tourism and Culture (which were already the weakest aspects of the brand) suggests these are two areas to be monitored and addressed, an uphill battle particularly during recessionary times, and when non-Western cultures are gaining strengths and appeal in many parts of the world.

In this year's report, we introduce "mini-hexagons" for each of the survey countries to illustrate the level of consistency of the nation brand across the survey countries. While Brand Switzerland stands out for being particularly well-balanced on a global level and in most survey countries, this pattern varies to some extent in some important markets. The Chinese are ardent fans of all things Swiss (except for Culture) and the Turkish people are enthusiasts also. On the other hand, the Italians and the French put a considerable dent in the brand image of Switzerland. In particular, the French and Italians do not rate Switzerland as highly on Tourism, People or Culture. Other countries less impressed with the cultural aspects of Switzerland include Sweden, South Africa, and the UK. In fact, the relative cultural weakness is consistent across almost all survey countries as the "southeast" area of the hexagon has the most blank space in all 20 "mini-hexagons".



Having looked at Switzerland's nation brand in detail across 6 dimensions, we will now discuss several other critical measures that can help provide important context for understanding the interactions between Brand Switzerland and the people of the world: favorability, familiarity and travel and product experience.

Overall Favorability

Overall favorability is based on the question of overall opinion of each country on a 7-point scale from extremely favorable to extremely unfavorable. This question is asked at the beginning of the survey in order to capture an unvarnished reaction, before the other questions and issues raised throughout the survey can shape respondents' thinking.

Table 8.1 shows the mean favorability score for Switzerland by each of the 20 panel countries. The right-hand column shows the difference between that country's mean favorability of Switzerland and that country's mean favorability of all of the countries.

Table 8.1: Overall Favorability of Switzerland

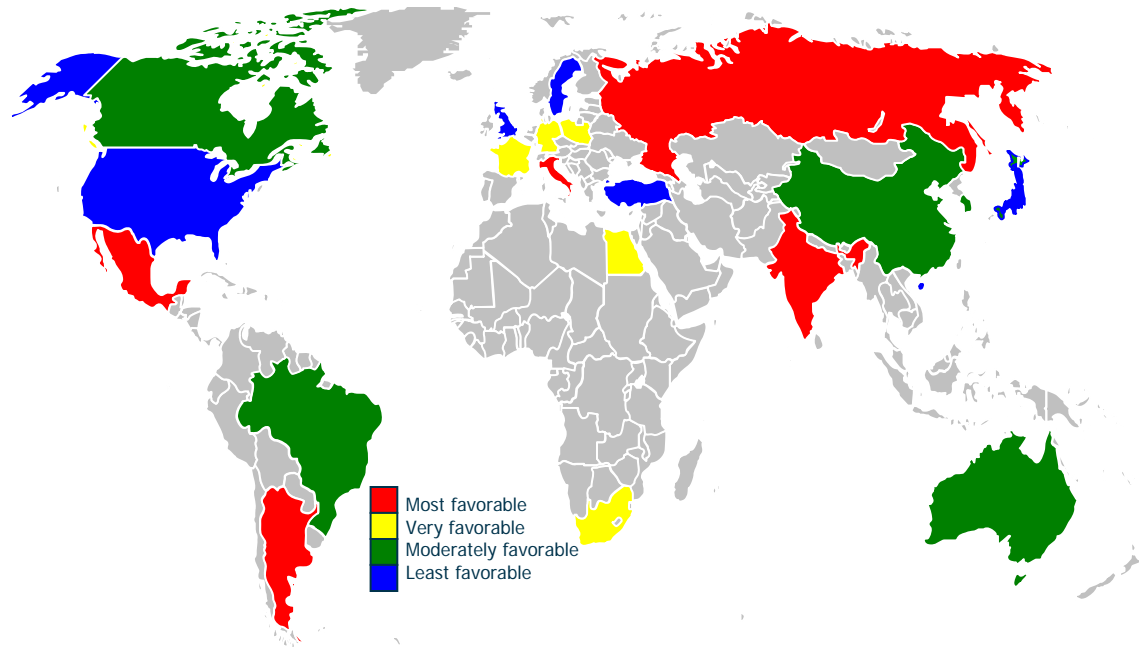
Panel countries	Mean favorability of Switzerland	+/- points from all nation average
Russia	5.89	+1.09
Argentina	5.71	+1.18
India	5.58	+1.00
Italy	5.53	+1.09
Mexico	5.50	+0.86
South Africa	5.45	+0.88
Germany	5.32	+0.99
Poland	5.30	+0.88
Egypt	5.30	+0.65
France	5.24	+0.84
Brazil	5.21	+0.79
Australia	5.20	+0.85
Canada	5.16	+0.79
China	5.12	+0.68
South Korea	5.11	+0.74
United Kingdom	4.98	+0.59
United States	4.90	+0.51
Japan	4.84	+0.55
Sweden	4.78	+0.52
Turkey	4.58	+0.57

The 2009 results show that Switzerland continues to be one of the nation brands that global citizens are most favorable towards – all 20 survey countries give Switzerland higher favorability ratings than their all-nation average. In Russia, Argentina, India, Italy and Germany, Switzerland has the greatest lead over the national average (fully 1 point on a 7-point scale). Russians and Argentineans continue to be more favorable towards Switzerland than anyone

else, perhaps in part because Switzerland offers an experience so far removed from their own daily lives – both geographically and mentally. Interestingly, although Italy is somewhat disparaging of the culture in Switzerland, Italians are highly favorable towards Switzerland overall – again suggesting that the lack of enthusiasm about the culture in Switzerland is perhaps driven by their legendary pride about their own culture. For perspective, the top three nation brands that people are most favorable towards -- Canada, Switzerland and Australia -- could all be said to be well-run mature democracies, unburdened by the controversies that surround countries like the United States or Germany.

Where in the world are people most favorable towards Brand Switzerland? In Figure 8.2 below we see a graphical representation of the panel countries' overall favorability toward Switzerland. The red colored countries are those that give Switzerland the "warmest" ratings. We see that these countries are mostly geographically dispersed and culturally diverse, from Latin America to Russia, with Italy and India in between. The blue countries, the United Kingdom and Sweden, have the "coldest" overall opinions of Switzerland, compared to the other panel countries. The countries in yellow and green are countries in the second and third tiers of the global spectrum of temperature towards Switzerland.

Figure 8.2: Global Temperature Map: Overall Favorability of Switzerland



While the overall Nation Brands Index® and the overall favorability ratings are both good indicators of the strength of a country's brand, the two measures should not be expected to be identical. There can be differences in the ratings because while the NBISM weights each of the 6 brand dimensions equally, a country's overall favorability can be driven by very visible aspects of the nation brand, which may overshadow other dimensions in building an overall impression. Furthermore, respondents' personal values and experiences also weigh in on their overall opinion towards a country resulting in different dimensions carrying different "personal weights" in the overall opinion of a country. That's why all these different measures are important tools for understand a nation brand – and why understanding how favorability is affected by experience and perception is critical.

Familiarity

Table 8.3 displays the percent of panelists from each country who have either familiarity with or some knowledge about Switzerland. The right-hand column shows how that percentage differs from the all nation average within the same panel country. This information can be useful in understanding whether raising familiarity can help improve a country's total NBISM and each of the hexagon points discussed above. For example, receiving a low ranking from a panel country that is very familiar with you and receiving a low ranking from a panel country that is not familiar with you could mean very different things. For the low familiarity country, you might be able to improve your brand's perception by working to get more exposure in that country – "you've got to be known to be liked". For the high familiarity country, however, you may face a greater challenge in changing already entrenched perceptions of your brand.

Brand Switzerland is truly a global brand. In 16 of the 20 survey countries, familiarity with Switzerland is higher than the all-nation average by at least 5 percentage points. Not surprisingly, this lead is about 20 or more points in neighboring Germany, France and Italy. Challenges remain for some important countries where Switzerland hovers around the all-nation average: the United States, Brazil, the UK, and Australia. Among panel countries, Russians again top the list of countries that feel most familiar with Switzerland, with nine in ten people saying they have at least some knowledge. At the low end, in Japan is also a challenge where only a slim majority feels they have at least some knowledge of Switzerland.

While considering the level of familiarity that the citizens of various countries have about Switzerland, it is important to remember that self-reported knowledge may not be well informed, which can be frustrating. Nonetheless, growing familiarity is the fundamental foundation for building a brand – creating opportunities to make sure the world's understanding of a nation is accurate.

Table 8.3: Familiarity of Switzerland

Panel countries	% with at least some knowledge of Switzerland	+/- points from all nation average
Russia	92	+9.00
India	84	+19.00
Germany	83	+23.00
Poland	82	+11.00
China	80	+10.00
Argentina	80	+8.00
Italy	79	+18.00
Egypt	79	+8.00
Mexico	76	+8.00
South Africa	75	+9.00
South Korea	73	+15.00
Sweden	73	+8.00
France	67	+25.00
Australia	67	+4.00
Canada	66	+10.00
United Kingdom	66	+4.00
United States	64	+2.00
Turkey	63	+6.00
Brazil	54	+2.00
Japan	53	+8.00

Experience

Personal visits to Switzerland, either business or pleasure, are not surprisingly highly correlated with geographic proximity. Italian, German and French citizens are most likely to have visited Switzerland. People from Egypt, Turkey, Brazil and Argentina are among the least likely to have traveled to the country – despite the fact that Argentina is one of the countries most favorable towards Switzerland. But people in Argentina are more likely to have experienced Swiss products or services, compared to those in Brazil and Turkey. This suggests that for Argentineans there is something powerfully attractive in the image and products of Switzerland, which are the proxy for personal in-country experience. It is interesting that Japan, the UK, and the U.S. – advance economies that have products and services competing with Switzerland -- all report relatively low Swiss product or service experience; it may not be incidental that these are also countries that report relatively low knowledge of Switzerland.

Table 8.4: Experience of Switzerland

Panel countries	% have visited for vacation/ business	% have visited for business	% have purchased products/services from country
Argentina	8	1	48
Australia	19	1	45
Brazil	7	2	35
Canada	13	1	41
China	9	4	52
Egypt	3	2	56
France	50	7	47
Germany	55	9	73
India	16	5	45
Italy	56	11	50
Japan	9	2	34
Mexico	10	1	56
Poland	15	6	74
Russia	9	5	59
South Africa	12	3	53
South Korea	10	1	55
Sweden	35	8	60
Turkey	7	2	33
United Kingdom	26	5	44
United States	21	7	41
20 Panel Country Average	20	4	50

9. Nations and the Global Economic Crisis

The global economic crisis has affected consumers and citizens in many countries around the world. While these events do not fundamentally change deeply held images, beliefs, and prejudices, they produce impressions and attitudes, and under the right circumstances, impressions and attitudes can ultimately harden into beliefs. This year, we have asked two questions to assess perceptions of the roles nations have played in the economic crisis: how the credibility of a country is affected by the economic crisis and how the country is perceived in terms of its contribution to the economic recovery. Not surprisingly, the United States, blamed by many around the world for having created the global financial crisis, sits on top of the list as the nation whose credibility is most negatively affected by the crisis. However, the U.S. is not just seen as the leading source of the problem; it is seen as the world leader providing the solution, as it tops the fifty nations' list for its efforts to address the crisis.

Other nations that rank high on the contribution list include large and medium sized advanced economies. Of the top 10 contributors, there are two distinct patterns when it comes to the impact on their reputation. The large economies such as the UK, France, Germany, Italy, and Japan – despite differences in financial market regulation, investment practices, and the degree of state intervention – rank high as nations that have suffered negative credibility, whereas medium-sized developed countries appear to have evaded that outcome as Australia, Switzerland, and Sweden are among the least negatively affected and Canada has a middling 23rd position on the list.

With relatively impressive domestic stimulus packages and/or stronger voices at newly formed G20 meetings and other global forums, China garners a high 11th rank and Russia is not far behind at 14th, as contributors to the global economic recovery, again outpacing smaller developed economies such as Denmark and Finland. Their roles as contributors to economic recovery are recognized across developed and developing countries. However, Russia's credibility is seen as having taken a more severe hit than that of the China's.

Table 9.1: Global Economic Crisis: Country's Contribution to Recovery vs. Negative Impact on Country's Credibility

Nation	Contribution to recovery rank order	Credibility rank order (1st=Credibility was most negatively affected)	Nation	Contribution to recovery rank order	Credibility rank order (1st=Credibility was most negatively affected)
United States	1	1	India	26	23
Germany	2	5	Poland	27	33
United Kingdom	3	2	Saudi Arabia	27	46
France	4	4	Taiwan	29	19
Japan	5	6	Czech Republic	30	23
Canada	6	23	Hungary	30	23
Italy	7	6	Turkey	32	14
Switzerland	8	49	Argentina	33	10
Australia	9	48	South Africa	34	18
Sweden	10	49	Malaysia	35	33
China	11	14	Mexico	35	6
Spain	11	11	Egypt	37	23
Holland	13	39	Romania	38	19
Russia	14	3	Thailand	38	19
Austria	15	39	Estonia	40	14
Belgium	15	33	Chile	41	23
Denmark	17	46	Lithuania	42	12
Finland	18	45	Indonesia	43	19
Scotland	19	33	Ecuador	44	33
Ireland	20	14	Peru	44	23
New Zealand	20	42	Colombia	46	23
Brazil	22	33	Cuba	47	42
United Arab Emirates	23	42	Kenya	48	39
Singapore	24	23	Angola	49	23
South Korea	24	6	Iran	50	12